Imperialism after Bush
Obama's Foreign Policy during the Global Financial Crisis and the 'Pivot to Asia

Leoni, Zeno

Awarding institution:
King's College London

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Zeno Leoni

Department of European and International Studies

King's College London

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Declaration

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Abstract

This dissertation makes a contribution to the third-wave of Marxist debates on capitalist imperialism and to the literature on both American imperialism and Obama's foreign policy. The theoretical challenge is to bridge the divide between Marxism and International Relations caused by the former's lack of a comprehensive analysis of the state. This work develops a Marxist analysis of both structures and agencies of imperialism looking at the relation between systemic, societal and individual levels of analysis and it constructs an argument to explain the politics of imperialism. The synthesis between structure and agency is sought, along these analytical levels, within the tension between America's global geoeconomy and its nationally-informed geopolitical strategy.

In the case-study, the discussion on imperialism goes beyond the aftermath of 9/11 and it provides an update about the post-2008, increasingly fragmented global order. It does so by exploring on systemic, societal and idiosyncratic levels of analysis the Obama presidency and the US geostrategic shift to the Asia-Pacific. It highlights both structural and agential factors of domestic politics and foreign policy of Obama's administrations and it explores the "pivot to Asia" from a global perspective, looking at military, economic, diplomatic and ideological as much as structural and agential forces on a pan-regional scale. Overall, this work concludes that US-China relations manifest a systemic inter-imperialist rivalry. However, it demonstrates that different agencies of American imperialism adopt different approaches to American grand strategy, an argument further confirmed by the final section on the Trump presidency.

Acknowledgements

The PhD is often described as a frustrating and almost insurmountable job. But if I look back at the last few years it would be unfair to make this statement without considering the difficulties posed by the environment where I worked. While the initial stages of the PhD were a challenging brainstorming, life in London was definitely harder despite this global city with its rampant capitalism is a privileged point of observation for understanding society.

The cost of living and studying in the city brought me to explore all sorts of jobs. I started as a "sandwich chef" in an industrial kitchen in Park Royal's industrial estate – West London – making meals which were delivered to week-ends tube workers, for £7 an hour without any taxation. While my foreman was an Italian citizen later arrested for some drug issues in Colombia, the owner of the business was a middle-aged Englishman who had won the contract to provide food for tube workers by bribing a Brent councillor –eventually the owner also won the management of the work site canteen where the new council was built, in Wembley. The instability of that job threw me into the bitter reality of London's unskilled labour market as I ended up working for one of the many bars owned by EAT for £6.19 an hour. There, I not only learned how little money one could earn with a part-time job, but I also saw mass production first hand as in each sandwich the amount of ham, cheese, tuna, salad, peppers and rocket was measured to the gram according to the company's guidelines. More sadly, this made me discover something I previously had little familiarity with – given my rural origins – such as the existence of poor workers or "new slaves". As I went to work at 5.30 in the morning in order to open the bar, it was impossible to forget the Latin American cleaners of offices who I met on the bus and who worked at difficult hours for a miserable pay.

After a period of transition thanks to my father's support and the not too generous Jobseeker Allowance, I started the PhD and a four years long work with a young BBC and Sky News journalist affected by cerebral palsy and Asperger syndrome. This was an incredibly challenging time with a very difficult individual who saw his life complicated by the unhappy circumstances of his family: his father was a bipolar individual and former businessman who had lost his company in the US; his mother died of cancer just after her new partner kicked her son out of the US – before the

funeral. During this time I was made aware of how class-driven is British society – particularly inside Sky News – and I recognised the hypocrisy of a professional environment where people only pursue happiness through hard work, at the cost of physical and mental health and a façade of fulfilment.
In addition to achieving a more comfortable London living wage – £8.15 an hour when I started, 9.15 when I left, plus roughly one pound every hour for holiday pay – it is during this experience that I developed a substantial part of my thesis. Radio 4 and Sky News offices, along with the train going from central London to Ealing Broadway, Osterley and Feltham were my working spaces. Certainly, it would not be exaggeration to say that one-fifth of this dissertation was done on a train. This was not ideal but it was effective in the attempt to get the reading and writing done while paying expenses. As the breakfast TV programme Sunrise started at 6am, my shifts began at 4am. Certainly the image of me trying to go through Poulantzas' books at that time of the morning after only a few hours of sleep, is emblematic of the hardship of students-workers in London and PhD students in general.
During this period I moved house ten times in seven years, and the last two were a consequence of Brixton's gentrification.
But the housing issue opens a more important section for this dissertation. As I relocated from the countryside to a big city, and from a Southern European to a Anglo-Saxon country, the culture-shock was difficult. What's more important though is that it brought me to think about "affection for territory". Italy remains a country without a solid nationalist tradition – this probably goes back to the fact that it was born out of an imperialist project while too many people did not want the unification of the country. However its tradition of small states and local diversity is alive and present in people's perception of the value of natural environment, agricultural products and historical customs. Personally, I find irreplaceable that ensemble of social relations, local kinships, characteristic landscapes and natural places for exploration. Surely, all these national qualities are undermined by people's bigotry, but – to echo Marx on "Hindustan" – such a conservativism is for me a reassuring symbol of a society that remains slightly less contaminated by the universalist ideology of capitalism.
The value of territory and identity therefore are real sentiments, despite history and elites can shape these feelings. Somehow this dissertation reflects experiences of my old – and hopefully future – life in the Italian countryside, and my current – and

hopefully soon past – life in London.
It is almost impossible to resist the temptation of saying that this work is only the product of my efforts and patience within a hostile socio-economic environment, where even metropolitan PhD colleagues seemed to be speaking a different language from mine. However many other people were involved in this project.
First of all, this dissertation would not exist without the unquestioned support of my parents Filippo Leoni and Raffaella Borgognoni – an important detail given that often parents may find irrelevant the study of unproductive subjects such as politics – together with the certainty that they would have intervened to overcome any financial difficulty.
Money apart, they transmitted me the great value of happiness through small things, the best inheritance one might ask to his or her family in this time of crisis.
The structure of the theoretical chapters would not exist without the inspiring interaction with the works of my professors. From my initial supervisor Gonzalo Pozo-Martin I first read the idea of value of territory – despite in my work it has a more political angle which I am trying to improve further – and the importance of focusing on ideologies of power. He seems to me, among those of his generation I came across, the most brilliant scholar with a rare and profound intellectual sensibility. Despite his presence was always random and distant he remained a constant support until the very last days of my PhD.
Reading some works from my second main supervisor Alex Callinicos I realised that behind Lenin's and others' literature there was a powerful political message. I really appreciate this, particularly given that we live in a society where economics and economists seem to dominate the stage of debates despite they only provide a limited analysis. And in fact another aspect I appreciated from my current supervisor is his method of observation, which in his political analysis never leaves anything to chance, from structural trends to subtle moods of governmental actors. I was also surprised by his rigorous approach to the profession which tells to me that a revolutionary can only fight the system if it applies the same efficiency of its enemy. As Gordon Gekko said "money never sleeps pal". Also, it struck me his approach to technology, which eventually brought me to explore the useful instrument of Twitter. Again, while I don't like the consequence of technologies on human beings and societies, I realised that a Marxist should always keep up with technological trends in order to better understand life. In this sense, when my mother bought me a tablet I was very sceptic

but it turned out to be a source of inspiration about some intellectual work I am planning to do on the gig-economy.
I also feel that I should mention Alex Colás from Birkbeck College, not only because in my Master dissertation I repeatedly misspelled his name, but also because without attending his "Space and Power in International Politics" module – which I would like to take with me to whichever university I will end up – I would not be here. Despite his eclectic and eccentric writings and his views on imperialism, I believe that his module was a great way of studying IR beyond realism and liberalism, with much intellectual richness and an interdisciplinary approach. I really must say that professionally, his module was life-changing for me.
My thoughts are also with Alexander Anievas. He was always kind enough to interact with me on several occasions at and in between ISA conferences, and I hope to have the chance to know him better.
On the private life side my girlfriend Lourdes Fernandez Menayo – a flamenco dancer – has always supported the idea of beginning a PhD since the very early days. In particular, she has always reacted in a cooperative manner to my need of reading and writing on week-ends or to the fact that every week I had to spend some nights in Feltham, where I worked. Given the relatively short career span of dancers, I hope in the near future to be able to help her with starting her own PhD.
My thanks also go to some friends such as Angelos Kontogiannis – PhD colleague – and Giuseppe Morale – Italian Consulate officer – for their encouragement. Friendship with them, unfortunately, might be transitory as everything else in London. But at the end, is not this a feature of capitalism? At least I hope that the experience of knowledge and relationships built in these years will be helpful to cope with a world that promises to become a very unpleasant place where to live.
Finally, I would like to thank Gilbert Achcar and Inderjeet Parmar for acting as my examiners and I look forward to engaging with their feedback and comments.

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Introduction

This dissertation makes a contribution, partly theoretical and partly in the form of a case-study, to the third-wave of Marxist debates on capitalist imperialism. This wave of discussions unfolded in the first decade of this century following the 2003 war in Iraq and the launch of Michael Hardt and Antonio Negri's controversial book *Empire* (2000). The main theoretical challenge this work attempts to meet is to bridge the divide between Marxism – a complex of theories centred on structural economic forces – and International Relations theory – a field which remains highly focused on politics as an autonomous sphere of power. In fact, the former has been in conflict with the second, as Marx did not develop a systematic theory of the state, and many thinkers, from Lenin and Gramsci to contemporary scholars, have attempted to pursue this tough enquiry. Consequently, past theories of imperialism are limited by their economic determinism, their lack of interest in the politics of imperialism and their avoidance of the problem of national specificity. This dissertation constructs a Marxist theory of the international which remains rooted in the structural and material forces of imperialism, thus the economy of imperialism occupies most of the theoretical discussion. However, I demonstrate that Marxism can be extended to incorporate some elements involving political agencies, such as strategic cultures and more generally the influence of history, geography and identity in state managers' ideologies of imperialism.

The theory presented here borrows James Rosenau's approach to foreign policy. In fact, while I do not engage directly with Foreign Policy Analysis (FPA) – a task left for a more advanced stage of my work – the discussion develops according to a three-tiered structure of hierarchically ordered but interconnected determinations – the global, the societal and the individual. After engaging with recent debates on the uneven geographical development of capitalism – the global – and state-capital relations – the societal – the thesis face the challenge of a more analytical explanation of how political agencies and ideologies of imperialism produce expansionary foreign policies – the individual.

Chapter 1 endorses the idea that capitalism's schizophrenic and fast-paced development poses a challenge to territorial states and a pressure on state managers to govern as much as possible flows of capital and create opportunities for their national businesses; **Chapter 2** asserts that the capitalist state acts within the boundaries of capitalism, although not necessarily according to the direct interests of the ruling classes; while **Chapter 3** highlights the potential for Marxism to provide a theoretical framework for incorporating social constructivist ideas such as strategic culture – with a particular focus on the United States. In fact, the solution to Marxism's limited usefulness in studying agencies is found by highlighting that Marx's view of human-nature relations, ideological unevenness and a materialist understanding of capitalism allow political values of territory – strategic, historical and symbolic – to be granted some consideration alongside economic forces.

The case-study is organized in four chapters. This structure vindicates the interdisciplinary and comprehensive framework developed in the theoretical part of the thesis. In **Chapter 4** I provide an account of some important aspects in the current geoeconomic and geopolitical scenarios. These are the result of the global uneven geographical development of capitalism, have opened up since the early 21st century and accelerated with the global financial crisis of 2007/2008.
It is essential to understand how the global balance of power has slowly but relentlessly created the conditions for American grand strategy to become more concerned with the Asia-Pacific.

Chapter 5 poses the attention on the socio-economic background of Barack Obama and on how he and his government interacted on some issues with the capitalist ruling class and the national security establishment– two groups which often operate according to profit-driven logics and often are allied.
This chapter shows that Obama's message for change in economic and security policies was widely overstated. However, it hints at the fact that Obama seemed actively committed to implement some degree of reform.
On the one hand these changes were not structural in scope; on the other hand he encountered stark resistance from elites and bureaucrats.

Chapter 5 also anticipates some contents with regard to the worldview of Barack Obama which is more accurately observed in **Chapter 6**. The latter, offers both an

account of existing works on Obama's ideology and grand strategy, and a counter-argument that reflects the opinion of this thesis' author and that also helps to guide the reader through Chapter 7. In particular, it is maintained that Obama had a very nationally-informed worldview that combined a domestic narrative of racial inclusion, international multilateralism – Wilsonianism – and a coherent understanding of America's geopolitical priorities for the maintainence of world hegemony at a time of limited resources – geostrategic pragmatism. As a consequence of his personal appreciation of the strategic value of the Asia-Pacific in the contemporary era, Obama recovered a nationalist narrative about the US Pacific identity in order to underpin his "pivot to Asia".

This three-tiered analysis leads the case-study to **Chapter 7**. This chapter explores the making and development of Obama's "pivot to Asia" as a policy. In particular, the chapter wants to highlight that Obama's administrations adopted a non-confrontational stance with China by attempting to enmesh Beijing in a legal-economic web framed by the Trans-Pacific Partnership. This geoeconomic instrument was backed by a strengthened diplomatic web of alliances with Rimland countries such as Japan, Australia and India. However, the US-China rivalry cannot be explained without considering naval competition and geostrategic calculations over control of the Asian sea lanes, in particular those running from the South China Sea to the Arabian Sea. Chapter 7 confirms that American grand strategy is determined by the fusion of competing and at the same time self-reinforcing geoeconomic and geopolitical logics, and that Obama attempted to strike the best possible balance between cooperation and conflict with China.

This work maintains that the US reaction to China's rise demonstrates the value of Lenin's theory of imperialism in the 21st century. At the same time, it remains evident throughout the case study that exploring the agencies of imperialism can provide a more nuanced and fascinating account of geopolitical competition. As the Afterword on the Trump Administration confirms, this work shows that when studying US imperialism it is crucial not to ignore the fact that different groups of political elites attempt to achieve the twin goals of American grand strategy – lowering the barriers to capitalism and eliminating threats to American power – in different ways depending on their strategic cultures, their domestic constraints and interpretation of international events.

Chapter 1

The systemic: Production of space by global capitalism and relations of power in international politics

Introduction

This chapter is the first stage in a three-tiered theoretical discourse that I construct in this thesis. It could be argued that it has greater importance than the other two theoretical chapters, because it sets the intellectual boundaries for the rest of the theory – although Chapter 3 is also important, as it is where I attempt to put forward fresh ideas.

I argue here that international politics and imperialism must be conceived of as processes which develop either according to the laws of capitalism or in an environment which is deeply influenced by capitalism. This does not equate to saying that the study of capitalist laws therefore sheds light on the complexities and interstices of a world order which is simultaneously both highly integrated and very diverse on many levels of analysis. By engaging with discussions on the relation between capitalism and international conflict, this chapter attributes great responsibility to capitalism for inter-imperial rivalries – as also does Chapter 2.

In particular, the perspective which this chapter takes to attempt to explain the relation between capitalism and political violence is the spatial dimension of capitalism – in other words the transformations of geoeconomic and geopolitical relations of power that capitalism produces. This chapter is thus also charged with the task of ensuring that the theory put forward in the three theoretical chapters remains within the frame of historical materialism – although, in Chapter 2 and more audaciously in Chapter 3, it also aims to offer a perspective which does not neglect the "political sphere" of imperialism. Underlying this work is the base-superstructure framework, the foundation of Marxism, which sees economic structures rather than political agencies as supreme. Imperialism remains a systemic phenomenon, a necessity for societies which pretend to pursue superfluous needs and live beyond the limits of physical and human nature. Within this kind of discourse, this chapter attempts to show the ways in which the profit-driven logic of capitalism sets serious dilemmas for politicians through crises and booms, uncontrollable movements of wealth and people and imbalances in the economic and military power of states. To politicians operating

within the constraints of capitalism, this means constant adaptation through trade agreements and monetary adjustments, diplomacy and military conflict in order to cope with the opportunities and challenges that a volatile and interdependent global economy presents.

This chapter aims to illustrate and compare two different views of economic space that have divided Marxists since the early 20th century, and it is divided into two sections accordingly. At the same time, I revise some theories of imperialism from the perspective of space before focusing more closely on the classical Marxist theory of imperialism and the role of the state in Chapter 2.

In the first part, I explore the arguments of those who believe that capitalism can deliver a world order in which economic conditions are equalized. Despite the heterogeneity of the authors surveyed in this part, they all share a similar faith in the power of capitalism to reduce geopolitical competition between states. They argue that this is because the borders of states become increasingly blurred and therefore political power will wither away, or because the economic integration which a transnational economy favours will mitigate military tensions. In this section I am particularly interested in examining Karl Kautsky's perspective on the period in which the classical Marxist theory of imperialism took shape and that of Michael Hardt and Antonio Negri with regard to recent discussions. While I find such confidence in the power of capitalism to develop and spread its benefits homogeneously across the globe to be an extreme and uncompromising view, I acknowledge that – for different reasons and with some exceptions – the world order enjoyed a high degree of economic and military integration between the late 1980s and the global financial crisis of 2008, reaching its apex during the 1990s, with geopolitical rivalries remaining at a minimum. However, I argue that events like the Eurozone sovereign debt crisis, the slow decline of the United States – both in terms of contribution to global GDP and domestic inequality– and the increasingly participative and assertive role of various countries in world politics – particularly China, India and Germany – have severely undermined the arguments of hyperglobalists and compelled them to re-evaluate their ideas and accept that capitalism develops unevenly along geo-economic lines, producing inequality on various geographic levels from cities to the international arena. In the same way that these differences produce tensions inside states, they generate tensions between states. While I attempt to endorse the theory of uneven

geographical development and imperialism put forward by David Harvey, I reach the conclusion that his theory falls short of improving on Vladimir Lenin's version of the theory of imperialism. While Harvey has developed a theory of capitalist development which explains how capitalism compels different regions and states to compete, he has only partly theorized the relation between capitalism and the politics of inter-imperialist rivalries. To solve this enigma, in Chapter 2 I first examine how capitalist forces and governments interact. In Chapter 3 I then attempt to explain how a Marxist theory of imperialism can make sense of the politics of imperialism, which requires a look at the ideologies of political leaders.

1.1. What does "production of space" mean?

To question the self-evidence of space is a scholarly action that can have repercussions for many academic fields. As far as this work is concerned, making such a claim in international relations is problematic because realism and classical geopolitics have dominated how space is looked at in that field. While these theories have some insights which can help Marxism to think about the politics of imperialism, this chapter reasserts the primacy of capitalism in shaping global economic and political space. In other words, this chapter considers space primarily as a dynamic entity which is constantly produced and re-shaped by capitalism: by how "value" is defined in current society. But the concept of "production of space" will sound oxymoronic to those who are new to the subject. In what sense can the most immobile assembly of natural materials and artificial objects in human existence be "produced", apart from when natural disasters happen? As Stuart Elden explains, the problem is that

> it is generally assumed that territory is self-evident in meaning, and that its particular manifestations – territorial disputes, the territory of specific countries, etc. – can be studied without theoretical reflection on territory itself (2013, p. 3).

But students should not worry too much about this, because even Henri Lefebvre, the first to speak of *la production de l'espace*, acknowledged that this concept could

sound eccentric: “many people will find it hard to endorse the notion that space has taken on […] a sort of reality of its own” (1991, 26). Lefebvre’s argument sounded clearer when he specified that the “production of space” refers to “*(social) space*” as “*(social) product*” (italics in the original; 1991, 26). However, he asked “if space embodies social relationships, how and why does it do so? And what relationships are they?” (1991, p. 27). The key to understand the meaning of “production of space” is to be found in the way Karl Marx re-defined the classical economics concept of the value of goods. It is beyond the purpose of this work to deal with debates related to Marx’s theory of value, but in order to uncover the idea around which the concept of “production of space” has been developed over the years, it is probably useful to read a passage from a short piece by Vladimir Lenin about the concept of value and what was new in Marx’s perspective:

> Where the bourgeois economists saw a relation between things (the exchange of one commodity for another) Marx revealed a relation between people. The exchange of commodities expresses the connection between individual producers through the market. Money signifies that the connection is becoming closer and closer, inseparably uniting the entire economic life of the individual producers into one whole (1913).

Put simply, in capitalism space assumes a meaning which goes beyond its size or natural features, and its production signifies the speed at which and the extent to which relations of production move forward along the path of development, the relations that events in a given part of the world have with other regions or even with the entire system, and how economic factors affect the lives of people inhabiting a certain region or state. While in realism state and society are enclosed within one another, according to Lefebvre’s understanding of space the latter is embedded in objects. Economic forces perforate politically constituted borders, homogenizing but also dividing social reality, acting at different geographical scales which become intertwined. Space is therefore an infrastructure “to produce surplus value” (Lefebvre, 2009, pp. 186-8) which is generated by “the flow of energy, the flow of raw materials, the flow of labour, the flow of information, and so forth” (p. 186) and through “networks of banks, businesses, and great centres of production. [...] highways, airports, and information networks” and the “city” (p. 187). As Manuel Castells put it

"[S]pace is not a photocopy of society. It is society", and it is provided with "a form, a function, and a social meaning" (Castells, 2009, p. 441).

However, differences over how the relations between (economic) space and (political) power that characterize global politics should be interpreted have been the cause of much division within Marxism, at least since the chaotic years that preceded WWI. These differences among scholars are not only the product of different points of view, they also arise from the contradictory and multifaceted nature of capitalism and its ability to deliver different forms of spatiality which, while at times appearing to be in contrast with one another, are often manifested together. Neil Smith and David Harvey offer an example that anticipates the general structure of this chapter, as while they share the idea of space as a social product, they offer different conclusions. In *Social Justice and the City* (1973), Harvey elaborates on Leibniz's insights, arguing that space emerges as the result of a process contained in objects, and not vice-versa. For Harvey, an object exists as long as it contains and "represents within itself relationships to other objects", relationships which produce space (Harvey, 2004, p. 2-4). Similarly, Smith maintains that "a Marxist analysis of space considers scarcity as 'socially created'" (1990, p. 115). However, they disagree over the extent to which space is exclusively socio-economic, and above all over how far social space is exclusively capitalist, as well as the degree to which geographical, historical and political complications undermine Lefebvre's concept.

1.2. Production of space I: the universalizing power of capitalism

With an advert across its rail network, train operating company First Great Western celebrated and justified a billion-pound investment stating that "like Brunel, we understand that to build a great railway is to galvanize and invigorate a region" (First Great Western). The aim of this contemporary project was not just to lay a few kilometres of iron bars: "Brunel didn't simply build a train line – he connected communities, promoted trade and brought prosperity to the region" (ibid.). When ambitious expectations like "galvanization", "invigoration" and "prosperity" are

associated with the word "space", the progressive thrust of capitalism comes to mind. This thrust is driven by profit, and solid infrastructures are fundamental for production.

In fact, while Marx was concerned more with time than with space, time is still very much related to the "relativity of geographical space" (Smith, 1990, p. 93). The speed at which an entrepreneur can complete the "turnover" – as Marx (1981, Chapter 4) called it – very much depends on the time of circulation of produced exchange-value.[1] This explains why transport, or the production of "means of transportation", is crucial in tearing down the spatial barriers that present an obstacle to the flow of capital and ultimately to the generation of profits.

It is not by chance that these ideas were developed by Marx halfway through the 19th century. The world economy was being made at such a fast pace at the time that historian Eric Hobsbawm decided it was *The Age of Capital* (1975). The forces leading the change were technologies of transport, the result of which Marx synthesized in the most space-saving illustration of any process of economic integration and globalization: the "annihilation of space through time" (1973, pp. 538-9). As Hobsbawm recalled, thanks to trains and steamboats Jules Verne could daydream about travelling *Around the World in Eighty Days* (2008). The mastery that capitalist relations of production assumed over economic life at the time was depicted by Marx and Engels in *The Communist Manifesto* (1967), a pamphlet containing a hostile but romantic illustration of the rise of the world bourgeoisie and depicting the unrestrainable wave of capitalist expansion. The process was revolutionary by definition, as it swept away older modes of production and levelled economic conditions across (some) nations, changing the way millions of people lived: "the bourgeoisie, by the rapid improvement of all instruments of productivity, by the immensely facilitated means of communications, draws all, even the most barbarian, nations into civilization" (Marx and Engels, 1967, p. 8).

The *Communist Manifesto* made many references to the breaking down of boundaries. Words such as "world-market" formation, "technology" diffusion, "connections", "globe", "cosmopolitan", "new industries" and the "interdependence of nations" made

[1]Enron and the crash provoked by mark-to-market are an example of the risk of overstretching (McLean and Elkind, 2003).

this work a must-read for understanding globalization both then and nowadays –David Harvey also reminds us of this (2010, p. 19). As Shlomo Avineri put it with regard to one of Marx's views on colonialism:

> Capitalist society is universalistic in its urges, and it will not be able to change internally unless it encompasses the whole world; it is this that determines Marx's and Engel's attitude to the concrete cases of nineteenth-century European expansion in India, China, North Africa, etc.(1969, pp. 3-4)

This universalism was described by Neil Smith as a "drive toward spacelessness, in other words toward an equalization of conditions and levels of production" (1990, p. 94). These very ambitious claims were described by Hall and Soskice, using the language of neo-classical economics, as a condition where "interest rates, profit rates, wages, and incomes in general would be converging as would rates of growth and productivity" (Berger and Dore, 1996, p. 8). "Spacelessness" equated to the end of space and implied an unrestrained faith in the power of transnational capitalism to homogenize ways of life around the world. However, it should be clear by the end of this chapter that the association of "spacelessness" with capitalism is contradictory– an unrealizable condition. Along these lines, Bob Sutcliffe (2008, p. 144-5) referred to "three expectations" in Karl Marx's earlier works – prior to *Capital, Vol. I* – or what he called three foreseeable and desirable outcomes of capitalist development: "repetition", "expectation" and "utopia". The first of these, "repetition", was fulfilled by Britain in its role as a lighthouse guiding the reach of capitalist industrialization and historical acceleration in other areas of the world:

> The country that is more developed industrially only shows, to the less developed, the image of its own future (quoted in Sutcliffe from the Preface to the First German Edition of *Capital,* Vol. I, 1867).

For Marx, colonialism acted as an "unconscious tool of history", bringing the germs of capitalism into historically retarded lands and dragging them on board the train of progress (MECW Volume 12, p. 125). British imperialism in India was a "misery" that Hindustan had never previously suffered and which created a social *tabula rasa* "without any symptoms of reconstruction yet appearing". But he concluded that the despotic "idyllic village-communities [of Hindustan]" constrained the "human mind within the smallest possible compass" (MECW Volume 12, p. 148). British

colonialism therefore fulfilled a double mission in India, with a *pars destruens* and a *pars construens*, annihilating old Asiatic societies first and then laying the material foundations of Western society in Asia (MECW Volume 12, p. 217). The sense of what Marx argued – which became indigestible to Dependency Theory scholars – is vindicated by the rise of China, India and others to the status of powerful countries, but in fairness this process was beginning at the time Marx wrote:

> Prior to the railroad era [1853], goods transport within India took place on roads, rivers, and coastal shipping routes. The bulk of inland travel was carried by bullocks, along the road network. On the best road surfaces and during optimal weather conditions, bullocks could pull a cart of goods and cover 20-30 km per day (Donaldson, 2010, p. 6).

By railway, goods could be circulated at a speed of 600 kilometres per day. Safe from piracy, the railway's reliability meant predictability, therefore allowing planning and ultimately meaning better productivity (p. 7). The increasing speed of trade guaranteed by railroads and the development of more effective waterways brought about a sensitive increase in real wages between 1870 and 1930 (p. 5).

1.2.1.Universalism and international politics

Why is it important to illustrate Marx's universalist view of capitalism, then, if he did not provide an explanation of the ways it affects relations of power among states? In fairness, Marx provided a deterministic account of the state, while also being generous but unsystematic in referring to more autonomist expressions of political power (for instance, see Liebich, 1982). Yet, Marx's theory of the state was an unaccomplished work. Engels explained that this was because he and Marx "had to emphasize the main principle", the importance of economic structures (Marx and Engels Correspondence, 1890, quoted in Seed, 2010, p. 65), even though Marx planned to write Book IV of Critique of Political Economy with a focus on the state. However, the globalizing tendency of capitalism was a perspective adopted by various authors to explain international politics, particularly as they foresaw integration and stability after the turn of the century. Eduard Bernstein, Heinrich Cunow, Karl Kautsky and in a

different way Rosa Luxemburg weaved this particular literary thread through the restless years approaching WWI.

Bernstein was a liberal influenced by Hobson's cosmopolitanism, even though his conclusions did not land anywhere near Hobson's with regard to imperialism. For Bernstein, capitalist development would deliver an international relations order which would be dominated by cooperation:

> The most industrially developed countries are simultaneously competitors and customers of one another; likewise, their trade relations expand simultaneously with their mutual competition […] the era in which peoples attempted to subjugate one another is finished in Europe, and the same will more and more tend to be true in Asia (quoted in Howard and King, 1989, p. 92).

Among social democrats, Heinrich Cunow, who was initially against WWI but later in favour of it because he interpreted Marx's colonial writings *ad literam*, maintained that "industry is not able to profit from colonial possessions" and that the belief that imperialism is necessary for English and German industries and societies to prosper "is completely false" (1900, p. 186). The responsibility lay in the "*need for employment and expansion on the part of money-capita*l" (emphasis in original; p. 191). Cunow went further than anybody else when he told Kautsky they should support imperialism, because "imperialism is present-day capitalism; the development of capitalism is inevitable and progressive; therefore imperialism is progressive; we should grovel before it and glorify it!" (Quoted in Kumbamu, 2010, p. 135).

Karl Kautsky became the most popular among those that shared this view. He believed that there were only two scenarios through which the imperialist order that was becoming increasingly evident in those years could be exited: "either a gigantic war that shall destroy some of the existing European states or a union of them all in a federation" (quoted in Howard and King, 1989, p. 93). But on the eve of WWI, it was the second scenario that he believed was most likely: capitalism was going to reach the stage of *Ultraimperialismus*. This conclusion was based on a change in the way Kautsky judged the relationship between mother countries and colonies, as laid out in *Colonial Policy Old and New* (1897-8; quoted in Howard and King), where he singled out two different kinds of colonies, each of which satisfied different interests. He distinguished "exploitation colonies", where imperialism showed its brutality through

the application of coercive means in order to gain cheap resources, from "labour colonies", which in the case of Britain for instance were the United States, Australia, New Zealand and others, which provided an "outlet" for European capital and therefore were the source of the majority of profits.

While Kautsky criticized imperialism, he hinted at a distinction between Manchesterism – liberalism – and imperialism. The latter substituted the former after the economic crisis and the industrialization of the late 19th century. He lamented that the rising imperial aspirations of other countries were not aimed at promoting free trade in the way England did, but hoped to "secure a privileged position for their own trade and their own capital" (1899, p. 158).

Kautsky's argument about England's lack of economic interest in colonizing exotic atolls was adopted by Michael Barratt Brown to confute Lenin's theory of imperialism and the scramble for territory (1970). Barratt Brown argued that profits which originated in territories which had been plundered by British imperialism were small compared to profits realized through peaceful British trade with Canada, the United States, Australia and other countries. Similarly, for Kautsky – like for Bernstein – it was because of "bureaucrats, state pensioners and "high finance" that mercantilist policies took the lead, while industrial capital favoured a peaceful order (Howard and King, 1989, p. 93), although it must be admitted that Kaustky's view changed over the years and was overall contradictory. In fact, the Czech-Austrian Marxist acknowledged that in the early 19th century, states forced peripheral territories to buy English exports and that by the end of the century military power was "of uttermost importance to finance-capital" (Kautsky, 1900, p. 173).

However, Kautsky later shifted again to a perspective which did not denounce the connection between capitalism and imperialism, saying that the German ruling classes had "nothing to win" from colonial policy (Kautsky, 1911, p. 476).[2] He adopted a Schumpeterian view which blamed organised violence like imperialism onto atavistic forces present in human beings – the fanaticism of Hitler might be an example of this. Kautsky affirmed that Germany's colonial policy continued thanks to the "careerism" of politicians and the German bourgeoisie's tradition of becoming "indispensable" to

[2] It must be said that in part this was because Kautsky thought that colonizing and re-colonizing certain countries had become increasingly difficult from a military point of view.

political power, acting as its "servant" (p. 477). Despite these contradictions, Kautsky's most representative argument, about what he called the ultra-imperialist phase, is clear. For Kautsky, what Marx argued about the rise of monopolies within national economies could be applied to the international order:

> [T]he result of the World War between the great imperialist powers may be a federation of the strongest, who renounce their arms race. Hence from the purely economic standpoint it is not impossible that capitalism may still live through another phase, the translation of cartellization into foreign policy: a phase of ultra-imperialism, which of course we must struggle against as energetically as we do against imperialism, but whose perils lie in another direction, not in that of the arms race and the threat to world peace (Kautsky, 1970, p. 46).

In contrast to Cunow, Kautsky opposed imperialism, but unlike Lenin he saw the world order as moving towards normalization or pacification, led by one economic-military pole. He was later attacked vehemently by Lenin for not considering imperialism a necessary outcome of capitalism, but a policy:

> Kautsky said that imperialism must not be regarded as a "phase" or stage of economy, but as a policy, a definite policy "preferred" by finance capital; that imperialism must not be "identified" with "present-day capitalism"; that if imperialism is to be understood to mean "all the phenomena of present-day capitalism" – cartels, protection, the domination of the financiers, and colonial policy – then the question as to whether imperialism is necessary to capitalism becomes reduced to the "flattest tautology", because, in that case, "imperialism is naturally a vital necessity for capitalism", and so on (1939, p. 90).

For Kautsky, concluded Lenin, imperialism amounted to no more than a "striving for annexations". To Lenin this sounded "very incomplete" (ibid.).

If it is impossible to place Rosa Luxemburg on the same side as people such as Kaustky, Cunow and Bernstein, she also seemed to follow Kautsky in some respects. Luxemburg was clear about the relation between political violence and capitalism when she stated that "militarism in all its forms […] can only be overcome with the destruction of capitalism" (1911, p. 447) and that the turmoil of the years between the

end of 19th century and WWI was evidence that capitalism does not bring about a "mitigation of international conflicts" (p. 451). However, like others in the German debate, she believed that capitalism would implode once non-capitalist space ended, a condition in which capitalism could find no outlet. This was a theory of inevitable capitalist over-stretch:"capitalism, as a result of its own inner contradictions, moves towards a point when it will be unbalanced, when it will simply be impossible" (Luxemburg, 2003, p. 24).

But Luxemburg should not be included within the group of Kautskyians, because while on the one hand she seemed to foresee the making of a global and open capitalist space, on the other hand in the final chapter of *The Accumulation of Capital* she insisted that capitalism is a "spasmodic expansion" that violently attacks people, nature and previous modes of production. Where capitalism encounters resistance to accumulation from "natural economy" one can see "the method of violence" (2006, p. 352).

1.2.2.The return of liberal accounts of Marxism

Almost one century later, in the 1990s, Marxist and liberal scholarship intersected once again as a special historical phase unfolded, and the similarity between Kautsky and William I. Robinson was evident. For the former, an international cartel swallowed rivals in the same way that national monopolies incorporated or eliminated smaller businesses in a domestic market. For Robinson – who believed that Marx's ideas were not entirely "applicable to the conditions humanity faces in the new millennium" (2002, p. 227) –just as Marx envisioned the national state as an instrument of the national capitalist ruling class, the transnational state (TNS) reproduced the same functions through its institutions of governance in the interest of a transnational elite. Robinson rejected the parallel between him and Kautsky, since the latter

> assumed capital would remain *national* in its essence and suggested that *national* capitals would *collude internationally* instead of compete, whereas my theory on the TCC emphasizes that conflict among capitals is endemic to the system but that such competition takes on new forms in the age

> of globalization not necessarily expressed as national rivalry (Robinson, 2007, p. 10).

Still, the implications of Kautsky's ultraimperialism for international relations were not substantially different from the implications of Robinson's observations. The latter explained that "a transnational institutional structure has played an increasingly salient role in coordinating global capitalism and imposing capitalist domination beyond national borders" (p. 17). Meanwhile, the similarity between Robinson's discourse and those of Keohane (2005) and Anne-Marie Slaughter (2009) were also clear. Robinson bought the hyperglobalist argument and announced the rise of a transnational state (TNS), which for him represented the final stage of capitalist development – a Marxist version of Fukuyama's "end of history" (1992) – an end of imperialism or of "the era of the primitive accumulation of capital" (p. 212). Spatially speaking, the TNS was not structured hierarchically, but on a horizontal set of "multi-layered" and "multifunctional" institutions which networked with each other (2002, p. 213). As a whole, this system was decentralized and the nation-state was no longer the institution that organized capitalism (ibid., pp. 213-5).

However, Robinson's picture was very radical, and it overlooked the existence of enormous and undeveloped spaces like China, India, Central Asia, Central Africa and South America. He also overlooked spaces of poverty in today's big cities, where the contemporary "reserve army" lives (Pradella, 2015). Furthermore, this is not only about raw materials, as Robinson thought – and Hardt and Negri have corrected their argument in regard to this in recent years (2009, p. 137-9). However, Robinson admitted that the transnational bourgeoisie was "faced with the increasingly dim prospects of constructing a viable transnational hegemony", although this did not bring back the state, and "global elites have, instead, mustered up fragmented and at times incoherent responses involving heightened military coercion, the search for a post-Washington consensus, and acrimonious internal disputes" (2007, p. 20). For this reason Robinson, like Leo Panitch and Sam Gindin, interpreted conflict as "less a campaign for US hegemony than a contradictory political response to the crisis of global capitalism – to economic stagnation, legitimation problems, and the rise of counterhegemonic forces" (p. 21).

The most popular and radical work to come from Marxist hyperglobalists, however, was Michael Hardt's and Antonio Negri's *Empire* (2000), considered by some to be the *Communist Manifesto* of the 21st century (Žižek, 2001).[3] In fairness, *Empire* contained the same progressivism of capitalism which characterized the *Communist Manifesto*, and while in the latter the possibility that capitalism would reach every niche of the globe was a forecast and a wish, *Empire* declared the mission accomplished – another Marxist "end of history". In fact, Hardt and Negri agreed with Thomas Friedman's idea that *The World is Flat* (2007). For them, state power had surrendered to a post-modern sovereignty which progressed through the free-flowing, subtle and elusive logic of the market-commoditization of life. This "new logic and structure of rule" arose with the passage to postmodernity. Biopolitics replaced geopolitics: a logic of rule based on the right to determine death gave way to a logic of rule whose central pillar was the right to determine how to live.

But what were the implications for space and power in international politics? Hardt and Negri maintained that there was only "one world", in which both physical borders– between states – and imaginative boundaries – between the First and Third worlds or cities and peripheries – became obsolete geographical cleavages. In a world where the most powerful economic entities fused and economic imperatives determined social and political actions, geopolitical conflicts disappeared to leave space for operations by the international police of a hegemon-guarantor of the fluidity of the global economy and more generally for the warship of the global commons. Hardt and Negri effectively endorsed O'Brien's "end of geography" (1992) when they argued that "capital seems to be faced with a smooth world order' – an order made of Baumannian 'liquid elements' – which took shape with the 'passage from industrial to informational economy' – and from Fordism to 'Toyotism'" (Hardt and Negri, 2000, pp. xiii, 294; Colas, 2007, p. 174). They believed that after the monetarist shift of the 1970s, wealth broke free from territorial constraints and a universal proletariat was born.

Hardt and Negri criticized Lenin's teleological view of history as a transition between different stages when they affirmed that there are no temporal boundaries, as capitalism is an eternal state of affairs (p. xiv). With this assumption, they considered

[3]For comprehensive critical perspectives see Boron (2004) and Passavant and Dean (2005).

the divide between North and South to be a mistaken paradigm, because North and South "clearly infuse one another, distributing inequalities and barriers along multiple and fractured lines" (p. 335). But most importantly for this thesis, Hardt and Negri argued that because there is no longer an outside, "the history of imperialist, inter-imperialist, and anti-imperialist wars is over" (p. 189). This is why the two authors adhered to Fukuyama's "end of history". They maintained that the "state does not, and indeed no-nation-state can today, form the centre of an imperialist project" and that "in Empire there is peace", wars are only "just wars" and eventually war is reduced "to the status of police action", the latter being exerted by United States (Hardt and Negri, pp. xiv, 10, 12).

Hardt's and Negri's argument in fact carries some truth, particularly looking at the years of US unipolarism, the rise of a network of global cities handling flows of capital and the apex of an alleged Kautskyian moment in international politics – the establishment of "an all-embracing power which had conquered all the others" as Bukharin predicted (1972, p. 142). But these truths were based on an understanding of capitalist development which made it very difficult for the authors to adjust to a capitalist world order that is always "in the making". As Manuel Castell highlighted,

> The space of flows is not placeless, although its structural logic is. It is based on an electronic network, but this network links up specific places, with well-defined social, cultural, physical, and functional characteristics (2009, p. 442).

There is a "space of flows" which is articulated in nodes and hubs and it has a place-based orientation (2009, p. 445).

1.2.3. The Kautskyian moment of world politics?

However, towards the end of the Cold War many scholars believed that events vindicated Kautsky, Robinson, Hardt and Negri. Finance became so powerful that the relation between markets and national monetary authorities was compared to that between a "tiger" and its "tamer" (Saccomanni, 2008). Four historical-geographical changes gave way to what Gideon Rachman called the "Age of Transformation":

China opened up to the global economy in 1978; Europe integrated its continental market in 1986; Latin America and India opened up to global capitalism; and the USSR set out on the transition towards a free-market economy (2011, p. 16). Meanwhile, the fall of the USSR unleashed a unipolar moment which lasted, officially, until that fatal summer of 2008 when not only did Georgia invade Ossetia, but Lehman Brothers also crashed (Callinicos, 2010, p. ix). China used the opening ceremony of the Beijing Olympic Games to project a powerful image of itself across the globe.

International trade reached a record expansion of 8 per cent per annum between 1950 and 1973, expanding again in the 1990s after the 1970s oil shocks. In the fifty-seven years preceding the Lehman Brothers' crash 9/15, average trade expansion was "stronger than in the first wave of globalization from 1850 to 1913", with 6.2 per cent per annum (WTO, 2008, pp. 15). Foreign direct investment (FDI) "increased in the 1980s by 14 per cent annually and by more than 20 per cent in the 1990s, peaking at US$1.4 trillion in 2000 and after the 'dot-com bubble'" (p. 19), while financial globalization was also "unprecedented" (Elson, 2011, pp. 75-6). As the Bretton Woods era came to an end and neoliberalism triumphed, financial flows were no longer "dominated by official loans and bilateral aid" but by "private banking flows" made possible by "recycling petrodollars" (Elson, pp. 109-110). During the first decade of this century Africa contained six of the ten fastest developing countries in the world (*The Economist*, 2011). The share of world poverty saw "significant reductions in…depth and severity" (United Nations, 2010b, p. 13). Starting from the 1960s, gross domestic product (GDP) in low-income countries experienced an upward trend of 4.1 per cent per annum, higher than the average for high-income countries (United Nations, pp. 14-5), and China's three-decades of double-digit growth played a big part in this.

1.2.4. Geoeconomy and post-geopolitical security

The "Age of Transformation" ushered in the "Age of Optimism" (Rachman, 2011) as international security, many thought, changed. Geoeconomy became dominant in some narratives to the extent that Luttwak claimed there was a passage from a "grammar" of security to one of geoeconomy. It was the rise of a post-geopolitical

security where the control of territory was seen as unnecessary and counterproductive (Mercille, 2008, p. 576; Sparke, 2007, p. 339; Luttwak, 1990, pp. 125-130). In the 1990s and 2000s, this intellectual upheaval was underpinned by novelties in military affairs concerning expenditure, tactics, technology and geography. "Bombers" replaced "boots" in the deployment of military power (Kagan, 2006), with the sweeping success of Desert Storm being one of the causes of this shift (Lambeth, 1993, pp. 9-12), while slogans such as "peace dividend" and "enemies become friends" appeared (Freedman, 1998, p. 5; Kupchan, 2010).[4] Supporters of spending on research & development (R&D) pushed for a change that was planned since the final years of the Cold War.

They wanted another "revolution in military affairs" (RMA) as they thought international politics had arrived at a "strategic pause" for Washington: the lack of substantial threats justified the diversion of efforts from battlefields to laboratories.[5] George W. Bush's wars were not different from those of his predecessors as "long-range strike capabilities" were central compared to the use of land forces, according to mainstream narratives (Kagan, 2006). However, the occupations of Iraq and Afghanistan require a more nuanced engagement with this argument (on this see Bacevich, 2016). Meanwhile, the use of drones surged in the years of Obama's presidency. Geographically speaking, the best portrait of the Kautskyian moment was Thomas Barnett's map (2003), which divided the world into two loose dialectical spheres: a Functioning Core surrounded by a Non-Integrated Gap. The former region permitted the natural development of capitalism; the latter was at odds with the political stability and security needed to create a business-friendly environment.

[4]Although this was thanks to capitalist inclusion rather than diplomacy, in contrast to what Chares A. Kupchan argued.

[5] Important technological advancements, however, already happened during and after the Vietnam War. While in the conflict the US adopted "forces designed for another type of conflict [...] it also innovated in several significant cases" (Mahnken, 2008, p. 107). Examples of these novelties were the McNamara Line, remotely piloted vehicles, and precision-guided munitions (Mahnken, 2008, pp. 107-118). Since the Carter Administration, not only US policy-makers sought to achieve a technological advantage on the USSR, but there also was pressure from a military reform movement that seek more appropriate and cheaper armaments tailored to the changing character of conflict (Mahnken, 2008, pp. 122-126).

By this time, geopolitics was considered dead for practical reasons as well due to the supremacy of airpower (Owens, 1999) and smart technologies, also known as "joystick warfare" (Shaw, 2013), although problems with counterinsurgency were a reminder of the enduring importance of control of territory. However, while the US acted as policeman in the Global War on Terrorism (GWoT) it developed a network of military bases and alliances which it was argued were ready to counter China on the global stage (Gershman, 2002). This was repeated in sub-Saharan Africa, where, using the excuse of "political instability, human rights and Kony", Washington militarized its foreign policy and supported the militarization of defence policies in these states (Nsia-Pepra, 2014).

In reality, inter-imperialist rivalries never disappeared, although it is correct today to speak of the return of geopolitics, which had become less visible for several reasons. First, in the 1990s capitalism was still going through a global expansionary phase with the wave of democratization, while acceptable levels of welfare were maintained in developed countries. Second, geopolitics in the sense of the scramble for territory did not disappear, but was so dominated by the world *hegemon* that states in the Western geopolitical sphere did not need to engage in it. Third, thanks to the American "open doors and closed frontiers" strategy (Colas 2008), states and multinational corporations (MNCs) could deal directly with corrupt or servile governments in developing countries in order to promote investments and trade agreements, and even in Iraq there were opportunities for companies from different countries. Finally, immediately after1989 the biggest players outside the American capitalist-military umbrella were either financially broke (Russia) or were still behind in terms of the economic strength necessary to underpin an assertive foreign policy (China and India). In fact, new terminology to describe military force appeared in the field of security, and authors studied Michel Foucault to understand concepts like "horizontally extended security" (Rothschild, 1995) and counterinsurgency. Warfare was believed to have entered its fourth generation (4GW), and with a military budget higher than that of China, the UK, France, Germany, India and others combined, the United States enforced law and order across the globe.[6]

[6] For a concise illustration of post-1989 warfare, see Bousquet (2011).

However, the "Kautskyian moment" was not a total condition, and in fact while inter-imperialist conflicts disappeared from the IR vocabulary, it was argued that "geopolitical competition" explained the state of relations among powerful states more accurately:

> [T]hough the phrase 'inter-imperialist rivalries' has canonical status in Marxist discussion deriving from the Lenin-Bukharin theory, it has the disadvantage of equating conflicts between states with the polarization of the state system into Great Power blocs that prevailed between (roughly) the 1890s and 1989–1991. The implication is that conflicts among states tend to take the form of general war between the Great Powers: the apparent absence of such a tendency today therefore demonstrates the absence altogether of interstate conflict (Callinicos, 2007, p. 537).

Shifting from "inter-imperialist rivalries" to "geopolitical competition" helps the Kautskyian moment to be seen in a more nuanced manner, downplaying the idea of an "Age of Optimism.

In fact, the US was not the only state to engage in geopolitics, although others could not do so to the same extent. Taken from this perspective, Martin A. Smith's analysis of Russian foreign policy strikingly endorses Callinicos' argument (2013), claiming that even when Boris Yeltsin was president and Russia had to surrender to the Washington Consensus in the post-Soviet space, geopolitical calculations remained in the mind of Moscow's elites. Similarly, David Kerr highlighted a struggle among the various factions of the Russian political elite in the 1990s to develop a tougher foreign policy against the West in Europe (1995). However nobody really wanted to challenge the United States. In this sense, Russia's opposition to the war in Kosovo, Germany's and France's opposition to the war in Iraq and China's resistance to US action in the Middle East did not trespass the boundaries of diplomatic tensions.

1.2.5. The imperialism of anti-imperialism: the problematic relation between the United States, imperialism and territory

In fairness, the novelties of the 1990s and early 2000s, and in particular the lack of interest in territorial control, were the apex of a new form of imperialism that became

increasingly consolidated after WWII. The United States' and European powers' lack of colonial possessions was unprecedented. In *Against Empire* (1995), Michael Parenti argued that while "sometimes imperial domination is explained as arising from […] a territorial imperative", after WWII this was no longer the case, as the United States succeeded in imposing an international regime that favoured its competitive industries (p. 15). Once colonial territories had achieved independence, imperialism was associated with terms that evoked the "continuation of exploitation by other means" – to paraphrase Carl von Clausewitz, and the use of phrases such as "informal empire", "colonialism without colonies", "neocolonialism" and "neoimperialism" became normal (ibid.). Synonyms of these included "imperialism of decolonization" (Roger Louis and Robinson, 1994), the "invisible hand" (Wade, 2003) (as opposed to the iron fist), international policing (Hardt and Negri, 2000) (as opposed to the subjugation of peripheral countries) and recolonization. Ultimately, some believed that the American empire acted "by invitation", as it exerted appeal on some countries which asked to be incorporated under Washington's hegemonic umbrella (Lundestad, 1986). Although former colonial powers had to change their path to imperialism – as second-wave theories of imperialism amply illustrate – the United States' quasi-global capability to mobilize power – military, economic and ideological – was the most evident example of such a shift.

However the contradictions of neo-imperialist rhetoric were evident with regard to the United States. Despite its narrative about exceptionalism, the US was involved in military operations in severe conflicts in the Balkans, Korea, Vietnam, Iraq, Haiti, Somalia, Sudan etc., and this contradiction was particularly evident during the campaigns in Afghanistan and Iraq. Niall Ferguson recalled that a national security advisor to Bill Clinton argued that the US was the "first global power in history that is not an imperial power" (2003, p. 155) and that the president who was in charge of a territorial occupation for longer than any other, George W. Bush, stated on two different occasions that "America has never been an empire" (ibid.). Similarly, when American troops were invading Iraq, the Defense Secretary Donald Rumsfeld assured the world that "we're not imperialistic. We never have been" (ibid.).

The theoretical problem at the base of US foreign policy's relationship with territory had important implications for Marxist debates. After the turn of the century, the main argument was that US military might was aimed at enforcing the rules necessary for

global capitalism to expand and reproduce, and not at controlling territories and fulfilling national interests. American imperialism's production of space was not based on the dissolution of national state borders – as in the British Empire. Rather, this imperialism seemed

> one that was promoted through sovereign states, including in the colonial world. This coincided with the commitment to an open door policy, which championed the free movement of capital across national borders (Kiely, 2010, p. 91).

This imperialism, often entangled in prolonged and expensive military campaigns, was used to stabilize and influence – rather than occupy – countries, relying mainly on CIA-led plots, proxy wars, the use of drones, economic coercion and multinational corporations (Colas, 2008). As Roger Louis and Robinson put it "ideally, the United States preferred 'independence' and covert influence to colonialism" (1994, p. 472). The Department of State in fact regarded the instruments and praxis of British domination in the Middle East as "outmoded" and 'dangerous to peace', even though American governments gave "priority to anti-communism over anti-colonialism" (Louis and Robinson, 1994, pp. 472; ibid. 474). Marxists' problem with US power – excluding Hardt, Negri and Robinson – was not about admitting that it developed in the form of an empire, but rather involved the distinction between formal and informal empire. I think it makes sense to argue that American power remains an empire more than a hegemony. Although these two concepts can be used interchangeably, the US was often involved in the domestic affairs of other countries, and this, for Münkler, is what distinguishes empire from hegemony (2007, p. 46).

Michael W. Doyle provided a theoretical point which can be helpful in challenging Marxist perspectives on the end of territorialism. In less suspicious times, he argued that

> Imperial rule involves not only international relations but also the domestic politics of both the subject country (the periphery) and the ruling state (the metropole). In the study of imperialism, therefore, international politics blends into comparative politics (Doyle, 1986, p. 11).

If "[i]mperialism's foundation, is not anarchy, but order, albeit an order imposed and strained" (ibid.), then the United States has been in the front line for enforcing stability in the post-WWII world order. Ultimately,

> The forces and institutions that drive and shape imperialism, moreover, are neither primarily economic nor primarily military; they are both economic and military, and also political, social, and cultural (Doyle, p. 11).[7]

Overall, US foreign policy has shown all the characteristics presented by Doyle. Most importantly, what can be evinced from Doyle's account is that economic imperialism cannot be seen as isolated from formal imperialism. However Leo Panitch and Sam Gindin championed a different view:

> The US informal empire constituted a distinctly new form of political rule. Instead of aiming for territorial expansion along the lines of the old empires, US military interventions abroad were primarily aimed at preventing the closure of particular places or whole regions of the globe to capital accumulation (2012, p. 11).

There are three problems with Panitch and Gindin's argument. First, if they accept that the American state has a stake in keeping the global lane of investments, production and exchange wide open, this means that the USA will have an interest in maintaining its global leadership. Second, as capitalism develops as a succession of different phases, maybe Panitch and Gindin's discourse works better for recent decades, which have been relatively peaceful. But do the authors have evidence that the USA would take the same posture in a world featuring rising great powers, like that after 2008? In fact Panitch and Gindin's account is at odds with America's new geostrategic focus on a rising China, a country integrated into the global network of capitalism and one of its locomotives. Panitch and Gindin cannot say why the US does not allow China to become a regional hub for supporting the global capitalism. Paul Wolfowitz clearly dismantled views like those of Panitch and Gindin when he stated that it is important to support "European integration" while preventing "the emergence of European-only security arrangements which would undermine NATO" (Tyler, 1992). Ultimately, Wolfowitz explained that

[7] For a neoliberal account of this aspect, see Nye, Jr., 2002, pp. 549-550).

> we must account sufficiently for the interests of the advanced industrial nations to discourage them from challenging our leadership or seeking to overturn the established political and economic order (ibid.; see also NSS, 2002, p. 30).

Certainly, as this is the case with Trump one might argue that Wolfowitz represented a particular elite which wanted an assertive role in the world for the United States. However, this still does not resolve a third problem with Panitch and Gindin's argument. They overlook the impressive number of US military bases spread across the globe which give Washington a high degree of influence over host governments. While the American path to empire has unfolded through a complex web of different powers and strategies, it has always needed territorial control in order to enforce a world order in its own image.[8]

1.3. Production of space 2: the uneven geographical development of capitalism

Following WWI, the concept of imperialism as a geopolitical power struggle remained overlooked for decades. In fact, decolonization drew the attention of scholars to the economic inequality between developed countries and former colonies. Contrary to the unified picture of the world put forward by the authors surveyed so far, World System Theory and Dependency Theory (Wallerstein, 1979, 2011; Baran, 1952a, 1952b, 1957; Frank, 1966) described a world characterized by economic asymmetry and clear-cut divisions. These works were inspired by another perspective emerging from Marx's (1953, 1963, 1968) and Lenin's (1939) work, but scholars overlooked the importance of geopolitical competition and focused on economic exploitation. However, the concept of asymmetries remains useful in introducing the main topic of the rest of this chapter. Contemporary Dependency Theory economists concluded that the European debt crisis demonstrated the difference between the causes of economic crisis in

[8] Hobsbawm wrote that for Woodrow Wilson, WWI had to make the world "safe for democracy", with colonies being "obtained or planted, in order that no useful corner of the world may be overlooked or left unused" (1987, p. 14).

developed and developing countries. In the former, the causes are endogenous, while in the latter they are produced by macroeconomic policies (Frenkel, 2009, p. 686) such as deregulation and "exchange rate predetermination" (p. 688; also in Frenkel, 2003). These economists thought that Germany and its satellites could manipulate the trade asymmetry between Northern and Southern Europe to their own advantage (Bellofiore, 2013, p. 502), which was possible in part thanks to "the impossibility of exchange rate adjustments" for EU members (Cesaratto and Stirati, 2011, p. 5). However, these studies remained limited because of the lack of a geopolitical framework to explain how Germany had become the regional hegemon in Europe. In fact, the authors admitted that it came as a "surprise" that a phenomenon that had been "typical over one century and a half of global capitalism for many developing countries" interested Europe (p. 2).

It should become clear in this part of this chapter that this is not an isolated or an inexplicable event. How is possible that in what is historically the deepest and most successful process of regional integration, scholars found the existence of profound economic asymmetries? One answer lies in an issue that I will survey in this chapter. Given that capitalism favours both integration and division, it could actually be that capitalism is in a constant process of making, and that geographical unevenness is a more accurate description than the illustration provided so far in this chapter. While both hyperglobalists and Dependency Theory students have delivered black and white illustrations, Uneven Development (UD) delivers a more complex scenario. In the scholarship of recent decades, the phrase "uneven geographical development of capitalism" has referred to the naturally highly volatile and at times irrational manner in which capitalism spreads economic, social and environmental fortunes and misfortunes across the global economic space. Neil Smith focused in particular on how the contradictions of capitalism direct the inflow or outflow of wealth into or out of one territory, determining its success or misery and accelerating or constraining its development.[9]

[9]Apart from a short passage in Chapter 2, this work does not engage with Uneven and Combined Development (U&CD) – which many confuse with Uneven Development. Originating from Leon Trotsky (2008) and focusing on historical and social unevenness, U&CD is nowadays a historical sociology of International Relations. Domestically, U&CD explores the encounter between capitalist development and previous structures of social and political power, while externally it looks at the geopolitical pressures that developed countries exert on backward ones to catch up. Kamran Matin has

Uneven development is manifested at a variety of geographical scales. At the urban level, it describes the reshuffling of metropolitan patterns of the distribution of wealth, with the passage from modern to postmodern cities. Urban space underwent processes of decentralization and concentration, leading to the appearance of rich residential gated communities in suburbs, agglomeration economies and private transport-based edge cities, with a good part of the low income population massed in proximity to historic city centres in shared and poor-quality housing. This has become a useful instrument to explain gentrification (Smith, 1982; 2002).
On a national scale, uneven development has produced many "divides", along North-South, East-West and coastal-inland vectors, as well as profound differences in welfare and productivity between provinces and regions in developed states. On an international-global scale, uneven development was often similar to "hit and run" tourism. In fact, it brought into the club of the wealthiest those states whose economic development was rooted only in a few productive districts or sectors – as with the G20 countries. Secondly, uneven development has caused a shift in economic and military power relations between core states and those of the semi-periphery and periphery, changing the international balance of power. David Harvey considers uneven geographical development to be a systemic source of imperialism, and there are various reasons why this might be true. I would like to put forward the idea here that geoeconomic unevenness imposes constraints on state managers who are attempting to attract economic opportunities. In developed countries, pressure from the ruling classes, the necessity to maintain a stable and growing socio-economic environment and – in some cases – an interest in maximizing the success of their state (particularly relevant to the most powerful actors) represent sources of international conflict. Meanwhile, in some developing countries it is vital to maintain the pace of GDP growth in order to avoid social unrest and economic crisis which could harm overly risky investments and produce migration issues in cities, construction sector paralysis and the withdrawal of investments from long term projects. Ultimately, for those states

provided a highly theoretical illustration of U&CD (2007, p. 427), while for U&CD applied to the causes of WWI see Anievas (2013). Justin Rosenberg, who re-launched the theory, stated that: it entails trans-historical relations of interdependence between societies; throughout history it has resulted in the interdependence of the social, material and cultural realms of these societies; it is, as Trotsky intended, a process of hybridization of different modes of production (Rosenberg 2006, pp. 324-5). For Rosenberg, international relations do not exist – particularly, in the way realists think of them. What exists instead is a "sociological definition of the international" (p. 324).

which have the means and opportunity to pursue it, increasing indirect influence over or direct control of a territory can grant access to a broad list of resources that can feed their economies: raw materials and foodstuffs, physical infrastructure, agglomeration economies, cheap labour, a vibrant consumer market etc.

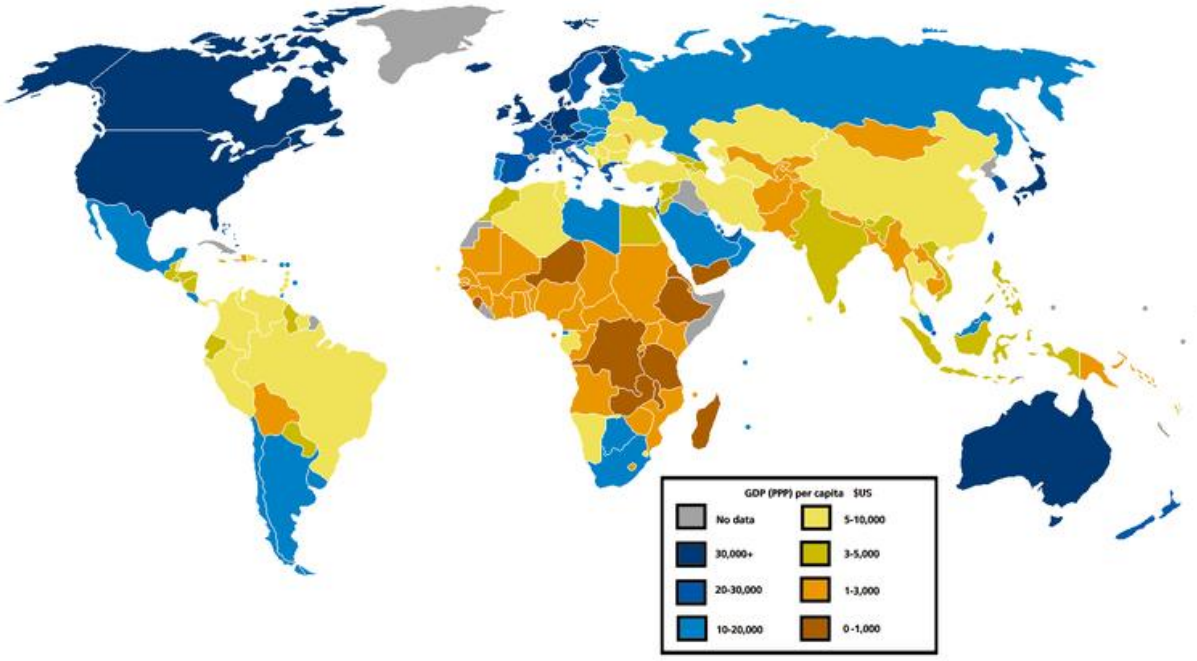
Of course, as I anticipated earlier, my endorsement of the theory of uneven geographical development also depends on my conviction that the different (e.g. universalist and asymmetrical) tendencies of capitalism overlap, coincide or alternate with one another. While I endorse UD, I am not arguing that is the prevailing condition at every point in space and time. Rather, I see UD as an overarching trend, inside which diversity and complexity can be found. This is an invitation to reflect on the possibility that different waves of capitalist development may coexist in the same historical period.

Still, an observation of historical events and economic development on a world scale reveals the limits of the spatial perspectives I discussed earlier. If a trend towards the equalization of global economic space exists, it is slower and more patchy than hyper-globalists argued. Peter Dicken portrayed the global economy in a way which corresponds to this description, stating that:

> The global economic map is always in a state of "becoming"; it is always, in one sense, "new". But is never finished. Old geographies of production, distribution and consumption are continuously being disrupted and new geographies are continuously being created. The new does not totally obliterate the old. On the contrary, there are complex processes of path dependency at work; what already exists constitutes the preconditions on which the new develops (2011, p. 14).

This sounds very similar to what Callinicos said. Certain pre-capitalist conditions are "restructured and integrated into a capitalist economic system that rests on the exploitation of wage-labour" (2009, p. 80).

The map below reveals some of the limitations of the literature surveyed above in this regard.



Looking at the map, a hyperglobalist would argue that parts of the world previously constrained by the yoke of colonial rule and extreme poverty, such as Mexico, Argentina, Chile, Uruguay, Libya, Saudi Arabia, South Africa, Botswana, Malaysia and Taiwan, or even China, Brazil and India, have jumped onto to the locomotive of modern economic progress. The first objection to make to this is that poverty is a very relative concept which cannot be measured in absolute terms. The condition of poverty is relative to the socio-economic reality one lives in, meaning that as long as there is unevenness there will be poverty and inequality. The second objection stems from a more careful look at the above map, very different from the kind of map put forward by Thomas P. M. Barnett. It can be seen that the world-system has become a harlequinesque representation of geographically dispersed states, regrouped, from the richest to the poorest, under overlapping epithets and acronyms such as the “Triad” – North America, the European Union, and Japan – the “Piigs” – Portugal, Italy, Ireland, Greece and Spain – the “Brics” – Brazil, Russia, India, China and South Africa – and the “Mint” – Mexico, Indonesia, Nigeria and Turkey. These multi-tiered spatial structures intertwine in turn with a web of networks of wealth whose hubs are global cities such as New York, London, Zurich, Milan, Moscow, Sao Paolo, Hong Kong, Taipei etc. A third objection is that GDP growth data is misleading because GDP is a closed box. In fact, looking at the regions inside states, the picture becomes more complex. Ranking world economic provinces in four groups, as the OECD does –

highest quarter, upper-mid, lower-mid, and lowest quarter – does not result in a clear-cut divide between the provinces of developed countries and those of developing countries. On the contrary, many countries, including Germany, the UK, Italy, Japan, France, Spain, Portugal and Chile, have provinces ranked in every stratum. As the OECD commented, "regional differences in gross domestic product (GDP) per capita within countries are often substantial and larger than among OECD countries" (OECD, 2011, p. 40).

These differences intersect with policy-makers' attempts to valorise different geoeconomic assets through strategies of de-territorialisation and re-territorialisation. For instance, the North-South divide in England is famously explained as a consequence of Thatcherite monetary liberalizations and industrial privatizations. The moment of de-territorialisation was caused by the closure of coal, iron and steel plants located in the North, accompanied by the impoverishment of that area. This event was paralleled by a moment of re-territorialisation, or "reindustrialisation" – as Kevin Cox called it – which produced an agglomeration economy around London:

> the new hi-tech sectors of industry that emerged in the advanced industrial societies in the seventies took root in an arc of towns to the west, northwest, and north of London: from Bristol in the west to Cambridge in the north. [...] [and] the Southeast (2002, p. 288).

This kind of unevenness is particularly evident inside the BRICS states, which are often taken as an example of the progressivity of capitalism, but whose success resulted from the opening to global capitalism in a specialized, concentrated area:

> According to the Gini index, the emerging economies – China, the Russian Federation, India and Brazil – displayed the greatest disparity in GDP per capita in 2007 followed by Mexico, Chile, the Slovak Republic and Turkey among the OECD countries (OECD, p. 40).

This issue was well captured by David Harvey when he explained that it is true that "occasionally some place "sees the light" (e.g. Japan and more recently much of East and Southeast Asia) and forges ahead, while the rest of the world lives in "the waiting room of history" (2005, p. 55-6). China is a telling example. The second largest world economy is ridden by massive inequality, which runs along several spatial vectors:

metropolitan-suburban, urban-rural, inland-coastal and East-West. While the Chinese middle class has grown to almost half a billion, there are still half a billion people who live in undesirable conditions. Despite the overwhelming availability of cheap labour, many important companies such as Samsung and Microsoft have recently transferred production to Vietnam, where salaries can be half those of China (Chu, 2013; Dignan,2014).

The unevenness of China's economy was captured by Cindy Fan (1997), who highlighted the tremendous shift in policy planning in the passage from Mao's era to neoliberal China. While under Mao investments were aimed at equalizing the spread of wealth across China, "post-Mao evaluations of these redistributive policies criticized their neglect of economic efficiency and their failure to accelerate national economic growth" (p. 620). Under Deng Xiaoping, uneven development policies concentrated investment in coastal regions, as Mao had been blamed for not maximizing "factors of production" and neglecting "scale and external economies" (pp. 620-1). To do this, Chinese political elites relied on "neoclassical regional growth theories", which "predicted concentration of growth in selected sectors or locations with higher efficiencies before diffusion to other sectors or areas takes place" (p. 621)and were based on concepts expressed in uneven-friendly terminology such "growth poles", "spread", "backwash" and "inverted-U" (p. 622).

These facts were also reflected in the Sixth (1981-85) and Seventh (1986-90) Five-Year Plans, which conceived of China's space as being organized along a "three belts-division". The eastern region was an "export-oriented" economy, the central region focused on "agriculture and energy", while the western region concentrated on "animal husbandry and mineral exploitation" (p. 623). While hyperglobalists believe that increasing ease and speed of movement would lead to these differences being flattened at some point, for Harvey, the shrinking of the world thanks to transport only amplifies unevenness:

> The general diminution in transport costs in no way disrupts the significance of territorial divisions and specializations of labour. Indeed, it makes for more fine-grained territorial divisions since small differences in production costs (due to raw materials, labour conditions, intermediate inputs, consumer

> markets, infrastructural or taxation arrangements) are more easily exploitable by highly mobile capital (2005, p. 77).

Global cities do not escape the logic of unevenness. Reading through the ranking of the Globalization and World Cities Research Network (GWC), for instance, one can easily see that many of the most influential cities have developed amidst misery (GaWC). In some extreme cases – Saint Petersburg, Dubai, Mumbai and Shanghai – cities are "built to look as if they were not where they are" (Brook, 2013, p. 3). Even Barack Obama perfectly captured how unevenness challenges the arguments of hyperglobalists when he stated that "it is easier now to send a shipment of goods from Nairobi to Amsterdam than it is to send those goods to many parts of Africa. And that is an impediment to trade" (The Economist, 2014b).
As an eminent thesis maintains "the increased mobility of capital brings about new forms of locational concentration, which are as much a part of this mobility as is geographic dispersal" (Sassen, 2001, p. 34). In fact "[T]he more dispersed a firm's operations across different countries, the more complex and strategic its central function" (Sassen, 2001, p. xx), the more likely the tendency to concentrate capital inflows hubs.

The conclusion to extrapolate from all this is that capitalist development spreads wealth across the world by following uneven patterns at different scales, patterns which are subject to change, as Foreign Direct Investment (FDI) shows. In fact, observation of FDIs vindicates the argument put forward by Lenin's discourse on uneven development – as shown in the next section. Until a few years ago, Paul Hirst and Grahame Thompson supported scepticism about globalization in *Globalization in Question* (2009), claiming that it was a myth because its hubs were mainly the countries of the Triad – the USA, the EU and Japan. However, Hirst and Thompson's argument has become less realistic today, as one can see from the following data. FDI flows declined conspicuously in developed countries:

> Of the global decline in FDI inflows of US$300 billion, from UD$1.6 trillion in 2011to an estimated US$1.3 trillion in 2012, almost 90% is accounted for by developed countries. FDI declined sharply in both Europe and the United States, while Belgium and Germany saw large declines in FDI inflows. (SPE)(UNCTAD, 2014, p. 4).

This trend has been paralleled by a steep increase in the flow of FDI towards developing countries, which "accounted for more than half of global FDI again in 2013, as their inflows reached a new high, at an estimated US$759 billion" (p. 5), while the growth of Asia-Pacific Economic Cooperation members and BRICS countries was remarkable, as their share of global FDI has risen to "twice that of their pre-crisis level" (pp. 7-8).

The competitive struggle between borderless capitals to grab the opportunities of space inevitably calls into question state relations, as states can act to restore conditions of profitability and support capitals which have ties with their territory. Despite the neoliberal belief that markets can work independently, it is the state that has the task of maintaining and recreating profitable conditions, as markets often fail (Brenner and Theodore, 2002, p. 352). However, in some states, where capitalism developed along uneven institutional lines, this requires some attention to state-civil society relations. For instance, Dicken mentioned four models: "neo-liberal market capitalism" (the USA and UK), "social-market capitalism" (Germany), "developmental capitalism" (Japan) and "authoritarian capitalism" (China) (2011, p. 177). In each case, states are entangled in the success of their economy in different ways, acting as "regulators", "competitors" or "collaborators" (Dicken, pp. 169-220). But this will be the object of discussion of Chapter 2.

1.4. What is "new" in the "new imperialism"? Territory and rivalries from Lenin to Harvey

Authors who describe capitalism as a mode of production that creates spatial asymmetries in reality deal only partially with Lenin's theory of imperialism. Among these scholars, Wallerstein (1979) is an exception, as for him cores, semi-peripheries and peripheries are interchangeable. However, he does not expand on the political implications of this part of his argument. Instead this was a pillar, in terms of spatiality, in Lenin's theory of imperialism. Ohnishi supported Lenin's theory and by

arguing that the rise of East Asia shows that rather than North and South diverging, there is an opposite trend:

> Lowest growth is in Japan, and the highest is China. The world economy is also similar in the sense that the US and European economies have collapsed and the centre of gravity of the world economy is going to shift to the biggest developing country, that is China (ibid.).

While China's path to becoming the new global hegemon has hit socio-economic obstacles, Onishi's statement is a correct, contemporary representation of Lenin's argument. Lenin in fact stated that:

> As long as capitalism remains what it is, surplus capital will be utilized not for the purpose of raising the standard of living of the masses in a given country, for this would mean a decline in profits for the capitalists, but for the purpose of increasing profits by exporting capital abroad to the backward countries. In these backward countries profits are usually high, for capital is scarce, the price of land is relatively low, wages are low, raw materials are cheap (1939, p. 63).

It goes without saying that once the previously backward country has industrialized, it will search for investment somewhere else. Countries may follow the sort of cyclical pattern shown by Ohnishi, leading to "1) low economic growth due to capital constraint", succeeded by "2) high economic growth by dissolution of the constraint" and then"3) low economic growth due to labour constraint" (Onishi, 2009, pp. 5, 112). Two kinds of comments may follow Onishi's argument. First of all, it seems that Western countries are well into their third phase – low economic growth and social resentment – but their states are very active in recreating conditions of profitability, domestically as well as globally, through trade and financial strategies (with regard to the US, see Wade, 2003). Secondly, developing countries may move from their second phase – high economic growth and low capital constraints – to their third phase earlier than Onishi's schematic argument predicts, before they reach the same level of development as mature economies. In China, while GDP growth is slowing down, some investors are already searching for more profitable opportunities in Vietnam. So, developing countries also develop structural economic needs similar to those of historically developed countries, and while part of capital is free to move somewhere

else, another part lacks the skills and resources to be competitive, which becomes a concern for state managers (Block, 1987).

In fairness this highlights the limits of one of Rosa Luxemburg's arguments, as in contrast to what she predicted, capitalism does not necessarily expand over every "non-capitalist territory". Otherwise, one would see huge tracts of Chinese countryside being developed further rather than e migration of investments towards Vietnam, for instance. Furthermore, if countries and regions want to attract investments, they often have to enter into a system of production and exchange whose pace is dictated by capitalist relations of production and where know-how and infrastructure are available. Returning to the map above, this explains why not every country and not every province of every country develops, even though, as Harvey recalls, "clearly, there is a great deal of contingency in the when, where and how of accumulation through dispossession", which makes it difficult to develop an exact theory of this dynamic (2005, p. 71).[10] This can often look like a "chicken and egg" situation, as there are times when capital cannot be invested because of a lack of infrastructure or when it prefers to move to more business-friendly environments. An example of this argument is "agglomeration economies" in global cities, when firms cluster in financial centres to lower production costs and increase the speed of strategic information gathering. In fact,

> Most investment today tends to occur within the charmed circle of the more developed countries simply because that is where most of the demand for new products, most of the skills necessary to produce them, along with states adept in their ability to regulate in a predictable, business-friendly manner, happen to be (Cox, 2002, p. 311).

But there are other times when a lack of infrastructure attracts courageous capital, which will eventually be imitated by many others, although the prize is certainly higher for who makes the first move. The economic value of territory in this sense is also relative and volatile, and it is the state's task to lower risks for businesses by developing legal and physical infrastructure, as may have been the case in Newly Industrializing Countries (NICs), or by imposing roadmaps of (capitalist) democratic

[10] Harvey's "accumulation through dispossession" is an update of the Marxian "primitive" or "original accumulation" (Marx, 1976, Part 8).

development, as in the case of US interventionism in unstable and unruled spaces. Recreating profitable conditions of production is what gives substantial meaning to the material value of territory because businesses need certain technological and political conditions in order to extract that value. However, this calls into question the political divisions across global space caused by states. Capital's ability to move where it is most convenient highlights the tension between the latter and the state. The "imperfect spatial mobility" of capital – because it always requires a spatial fix – and the "relative spatial fixity" of the state – because of population movements and historical and ideological narratives, as I explain in Chapter 3 – can bring about conflictive scenarios.

If businesses attempt to take up new opportunities and face challenges – competition – they can set the state a dilemma: either the state catches up with capital's dynamism or it gives capital up. While corporations need the state, states require collaboration from businesses. On the one hand, state mangers are faced with pressure from very powerful business coalitions which can blackmail politicians by interfering with their careers or by targeting their private life. On the other hand, political leaders may understand that in a global capitalist system the only way to achieve success with regard to socio-economic stability, state power and individual prestige is to compete with the weapons provided by capitalism. For Lenin, the decline in the economic power of some states could result in international competition (1939, p. 91-92). Regarding this scenario, in fact, Lenin made an important statement on the durability of the Kautskyian moment:

> We ask, is it "conceivable", assuming that the capitalist system remains intact—and this is precisely the assumption that Kautsky does make—that such alliances would be more than temporary, that they would eliminate friction, conflicts and struggle in every possible form? The question has only to be presented clearly for any other than a negative answer to be impossible (pp. 118-9).

I will illustrate later why Lenin says this alliance should break up. What is clear so far is that capitals are interested not just in any territory, but in territories rich in resources and infrastructure, or territories that grant access to a market. While each state may practice imperialism in its sphere of influence, there is a risk that the imperialism of

different states may collide geographically, as the mobility of their capitals may develop interests over the same space, which for Lenin is not necessarily a "non-capitalist territory" (1939, p. 91) – the reference is to Alsace-Lorraine.

This holds true particularly if the world is "already divided up" quite extensively – as was the case during WWI. Recent tensions between Russia and the EU are a case in point, because while the former reacted to an attempt by the second to penetrate a new market, American companies had important stakes in Ukraine – as revealed by Ahmed (2014). This means that although Lenin's theory was based on the "division of the world" and "uneven development", and Bukharin's focused on national monopolies developing into international enterprises with the help of their state (Howard and King, 1989, p. 66), the two theories can be fused within one coherent framework. However, an International Relations discussion cannot overlook the fact that Lenin anticipated realist theories of the rise and fall of Great Powers – with a coherent analysis of capitalism to back his argument up. Lenin made some fascinating suggestions which hinted at the use of force to achieve, indirectly, other objectives:

> an essential feature of imperialism is the rivalry between several great powers in the striving for hegemony, i.e., for the conquest of territory, not so much directly for themselves as to weaken the adversary and undermine his hegemony. (Belgium is particularly important for Germany as a base for operations against Britain; Britain needs Baghdad as a base for operations against Germany, etc.) (pp. 91-2).

In the following passage, he explained more precisely what the relation between uneven development and state rivalry is:

> This is because the only conceivable basis under capitalism for the division of spheres of influence, interests, colonies, etc., is a calculation of the strength of those participating, their general economic, financial, military strength, etc. And the strength of these participants in the division does not change to an equal degree, for the even development of different undertakings, trusts, branches of industry, or countries is impossible under capitalism. Half a century ago Germany was a miserable, insignificant country, if her capitalist strength is compared with that of Britain of that time; Japan

> compared with Russia in the same way. Is it "conceivable" that in ten or twenty years' time the relative strength of the imperialist powers will have remained unchanged? It is out of the question (pp. 118-9).[11]

This analysis was highly systemic, and while one hundred years ago it was certainly advanced, its theoretical power nowadays could be boosted if it provided an analysis of international politics which captured diversity. David Harvey is one of those who attempted to tackle this problem. In Giovanni Arrighi's words, Harvey sought "a connection between processes of capital and expansionist political-military projects – such as the Project of the New American Century that has inspired the US War on Terrorism and the invasion of Iraq" (Arrighi, 2006, p. 201). The main pillar of Harvey's Marxist theory of imperialism is the concept that capitalism works "towards the reduction, if not the elimination, of spatial barriers" (Arrighi, 2005, p. 35). But given the speed with which capitalism produces goods and generates profits, the result of this tendency is an over-accumulation of surpluses "above what can be profitably reinvested in the production and exchange of commodities within existing territorial systems" (Arrighi, 2005, p. 36).

Over-accumulation is defined by Harvey as a condition characterized "by idle productive capacity, a glut of commodities and an excess of inventories, surplus money capital (perhaps held as hoards), and high unemployment" (1989, p. 181). According to Harvey, the consequence which most frightens state managers is the rupture of the social pact between capital and labour when salaries stagnate and the peaceful social, economic and – as we see nowadays – political order of liberal-democratic states is endangered by class conflict (Harvey, 2005, p. 10). It is within such a framework that Harvey put forward the concept of a "spatial-fix". On the one hand, a spatial-fix means that capital is attracted to areas with a high rate of profit and therefore flows out from one territory to be invested – fixed – in another region, leaving "devastation and desolation" behind. In this sense, a spatial-fix represents "a metaphor for a particular kind of solution to capitalist crises through temporal deferral and geographical expansion" (Harvey, 2003, p. 115). On the other hand "a certain portion of the total capital is literally fixed in and on the land in some physical form for a relatively long period of time" (p. 115), and cannot find a new "spatial fix" –

[11]This quote also undermines Spyros Sakellaropoulos' and Panagiotis Sotiris' argument that Lenin's analysis is about U&CD (ibid., 89-90).

which means that it cannot be easily re-invested somewhere else due to the expense of dislocation and the difficulty of accessing foreign markets. For many businessmen, abandoning a region could mean losing what Marx called "advanced capital", and not everyone has this flexibility. But this is a dead-end street, because those who do not delocalize risk their investments being unutilized or underutilized. According to Harvey, the domestic "spatial-fix" brings the economic crisis into the social and political sphere because an alliance "emerges to establish a pattern of governance in which the stakes are fundamentally the economic health and well-being of the region rather than that of class", led by "landed and finance capital", but also participated in by "local bourgeoisies" and "elements of the working class" (2006, p. 103; 1982, p. 428-9).[12]

As I do in the case-study in this thesis, Harvey stated that one geopolitical consequence of the "spatial-fix" in the "political and military question" concerns China, since the latter is a state independent of the US network of alliances – in contrast to Japan, which was once believed to be America's future challenger – and which seemingly intends to assume a hegemonic role over the Pacific (2003, p. 84) – what Mearsheimer describes as Beijing's Monroe Doctrine (2006, p. 162). In this context, energy security becomes even more strategic than before, particularly from an offensive and deterrent perspective – as in Lenin's conclusion. Indeed, control over Middle Eastern oil reserves would serve US interests very well if it ever felt it necessary to rein in Chinese geopolitical ambitions (Harvey, 2003, p. 85). But geopolitical strategies pose a dilemma "between keeping the world open enough" for business, while "prevent[ing] the rise of any grand challenge" to American power (p. 84) – as was discussed with regard to Paul Wolfowitz above. Ultimately, this risks creating tensions between the "logic of capital" and the "logics of territory" (Harvey, 2003) – embargoes against Iran and Russia and the economic damage to the global economy are a perfect example of this tension between international business and national geostrategy.

But, as Wolfowitz knew, tension between politics and economics is unavoidable because in the long run one risks triggering the rise of new centres of power and

[12]However, this argument cannot be applied to politically weak countries like those in Southern Europe, in my opinion, given how little political resistance to transnational capitalism these showed.

competitors (Harvey, 1982, p. 435).[13]

While Harvey's work has nothing to do with realism, his conclusions about the politics of imperialism need further analysis because he ended up in an *impasse* similar to that of Lenin. In fact, Harvey argued that the politics of imperialism reflects the logic of politicians, who "typically seek outcomes that sustain or augment the power of their own state *vis-à-vis* other states" (2003, p. 27). Similarly, Lenin concluded that states attempt to "weaken the adversary and undermine his hegemony" (1939, p. 92). However, David Harvey provided further insight when he explained in more detail that

> the statesman seeks a collective advantage and is constrained by the political and military situation of the state and is in some sense or other responsible to a citizenry or, more often, to an elite group, a class, a kinship structure, or some other social group. […] Strategic decisions of sometimes immense import (and not a few sometimes startling unintended consequences) are arrived at and implemented in the rough and tumble of the political process where variegated interests and opinions clash [...] (2003, pp. 27-8).

As Harvey's conclusions require further development and clarification, in the next chapters I will try to unpack the issues that his argument on the new imperialism contains. In Chapter 2 I will focus, broadly speaking, on the "collective" concerns of state managers and their relations with the capitalist ruling class, then in Chapter 3 I will attempt to build a theoretical bridge between Marxism and the politics of imperialism by taking up Harvey's suggestion to look more closely at foreign policy decisions.

[13]Although this view has been accused of being too realist by "embracing a state-centric vision of imperial oil rivalry" (Paul, 2007, p. 52).

Conclusion

Throughout this chapter I have intervened in a specific group of Marxist debates about the causes of capitalist imperialism which developed from the beginning of the 20th century and have been revived since the beginning of this one. The reason for this discussion was two-fold. First it provided the overarching framework within which international politics and imperialism happen and attempted to demonstrate that the global economic system acts as a powerful constraint on state managers. Second, while all the perspectives explored offer insightful and fascinating interpretations of Marxian laws of capitalist accumulation, and while these theories resulted in interesting structural analysis of capitalism and its (geo)political implications, their contribution to the application of the theory of imperialism to International Relations leaves some questions open.

More precisely, this chapter has developed in the following order. After defining the meaning of socio-economic space, it unfolded largely through a survey of two Marxist perspectives on the global spatiality of capitalism and its consequences on an international level. It argued that theories that endorse a progressive view of capitalism provide a partial and overly biased view. In criticizing hyperglobalists' faith that capitalism can deliver a peaceful geopolitical order, I acknowledged that while the homogenizing tendency of capitalism must be taken into account, it is misleading to argue that it represents the main trend. While these theories hold true in certain historical periods, they are undermined by the events of the current historical period, such as the crisis of globalization – increasingly evident since Brexit and Donald Trump's electoral success. After briefly showing that capitalism produces stark regional divides across a developed economic space such as Europe, I argued that uneven geographical development is the perspective on space which best describes the complexity of a world economy which is constantly in the making in both developed and undeveloped regions. First of all, I briefly illustrated the different ways in which capitalism can produce uneven development, stressing that shifts in the balance of power between states are its most important outcome and offer great insight into inter-imperialist rivalries. In order to do this, I started from the theoretical discussion developed by Lenin. Lenin arrived at a realist *impasse*, and I argued that David Harvey

concluded his work without resolving the problem of Lenin's analysis of imperialism, proposing the same formula once more. David Harvey's weakness is representative of the central problem of many contributions to the contemporary debate in that they develop narratives but do not arrive at a coherent conclusion. In other words, Harvey's and others' accounts fail to explain the intersection between the structure and agencies of imperialism. The question that has remained open since Lenin published his pamphlet is how to theorize more precisely the intersection of economic and political interests in an imperialist strategy. At a time when university International Relations courses still ask their students whether Marxism can be an IR theory, Marxism would be more popular if only it allowed some political factors to be taken into account.

In this chapter I have stressed that capital dynamism is driven by those socio-economic values of territory which are fundamental for high rates of profit and expanded reproduction. These values are embedded in cheap raw materials and labour, accessible markets and space available for infrastructural and real estate projects. While I have so far attempted to illustrate the economic value of space, from now on it is necessary to explore how it intersects with the political sphere of power in capitalist states. As it will be seen Chapter 2, is not always possible to individuate the direct economic interest behind the strategy of state managers. Inevitably, geopolitical calculations intersect with the interests of capitalist ruling classes, either because security threats need to be given priority or because certain economic interests need the indirect backing of the political power which organizes the political, economic, social and natural environment in which business will happen. While this chapter has illustrated the global spatiality of capitalism, the next chapter will add to this picture an additional element of complexity: the existence of sovereign territorialities which, despite being managed according to the capitalist logic of the maximization of power, do not always find a direct shared interest with the endemic and physiological needs of capitalism. However, the tension between economic and political interests remains the theme that takes the discussion forward to Chapter 3, when this contradiction will be further developed.

Chapter 2

The societal: State-ruling class relations and imperialism from Classical Marxist theory to 21st century debates

Introduction

Like this chapter, the previous one had several purposes. First, it recalled that space is embedded with an economic value which is crucial for the expanded reproduction of capitalism. Second, it provided an opportunity to survey the main Marxist traditions regarding the capitalist production of space. While appreciating some of its insights, I rejected the hyperglobalist perspective, as it fails to provide a complete picture of the world economy, considering it in isolation from the concept of unevenness. In an attempt to recover and endorse Lenin's theory of imperialism, the second part of the chapter focused on capitalism's uneven geographical development. Finally, I demonstrated that the discussion of uneven development in David Harvey's recent writings arrived at a stalemate similar to that reached by Lenin, caused by a lack of any analysis of the state in the international arena.

While Chapter 1 and Chapter 2 might seem to be drawing on similar literature, they were constructed to look at two different levels of analysis. Chapter 1 wants to offer a critical view of what is imperialism on a global scale and what are the implications faced by states that – often like bowling pins – operate within this global system. Chapter 2 instead will now move the discussion to the second level, that of state-capital relations. It will explore the main force behind imperialism from a point of view of the state and of the problem of the state to satisfy its ruling classes while protecting and strengthening its geopolitical status. This is the level at which both state managers and big businesses react to and deal with the obstacles – as well as the opportunities – that result from capitalism's geographical unevenness. With regard to this, the classical Marxist theory of imperialism provides two additional insights. In addition to the rise and fall of states, the theory gives centrality to the historical phases of capitalist development – whether this is characterized by competition or monopoly or whether this is an increase of immaterial over material accumulation – and the influence of big business on states, as well as rivalries between states. As I explore the arguments of the theory's authors I will attempt to highlight strengths and weaknesses before defending it against its most well-known criticisms. Between the first and the final part, the chapter will also explore some issues related to Nicos Poulantzas' work on the state, given the lack of any engagement with political power and imperialism

roughly between WWI and the early 21st century. While I show some of the limits of Poulantzas' work, I will examine his case-study of Otto von Bismarck's experience – a story which is central to Poulantzas' analysis – in order to put forward the idea that political elites, within a framework of capitalist socio-economic structures, develop a certain degree of autonomy determined by geostrategic calculations and ideological worldviews. More specifically, the Bismarck example will show that state managers are compelled to rely on capitalism if they want to maximize state power in the international system. While politicians remain very receptive to the needs of economic elites, they are also constrained by the fact that success is inevitably tied to the fortunes of their state economy and to technological advantage, regardless of whether the strategy to achieve success goes against the particular interests of a section of national or international capital. I take this point further in dealing with some of the arguments that characterized the debate on Marxism and the international during the first decade of this century. While I highlight the limits of Harvey's theory of state-capital relations, I also take issues with Benno Teschke and Hannes Lacher's counter-argument to Harvey's and Callinicos' approaches to imperialism. I argue that Lacher and Teschke repeated the same mistake as Karl Kautsky.

The final section of the chapter endorses Chris Harman's idea of the structural interdependence of state and capital and draws on some recent literature about state-capital reciprocity. This aspect was particularly evident in the making of the Trans-Pacific Partnership, although Trump's involvement now requires more complexity to be added to this analysis. Ultimately, as I approach Chapter 3 I suggest that a Marxist theory of imperialism can incorporate three dimensions in order to escape the lack of specificity that was its crucial weakness. The first is the uneven and combined development of capitalism (U&CD), and in fact to produce an argument that is more circumstantiated than "structural interdependence" it is important to outline the historical and peculiar dynamics of state-capital relations in each country. The second dimension is the hierarchy of the international system of states. Establishing the position of a state in the hierarchy at a specific point in history is fundamental to predicting and explaining its actions, interests, alliances and constraints. Finally, I argue that these adjustments are not sufficient to develop a Marxist theory of geopolitics and that a third dimension is needed in order to tackle this issue. This dimension is my most original contribution to the debate on imperialism which has

arisen since the turn of the 21st century, and refers to the ideology of state managers and how their worldviews relate to geography, history and strategy. Chapter 3 will thus show that Marxism already possesses as yet unexploited tools that can be used to devise theories of nationalism, geopolitics, territory and social constructivism by focusing on how the ideologies and calculations of capitalist state managers are fed by political (historical, symbolic and strategic) values of territory.

2.1. The Marxist theory of imperialism: different authors, three pillars

At first glance, it may be tempting to refer to classical Marxist theories of imperialism. These theories did not arise out of the work of a coordinated research network, as Lenin and others were not academics and so did not build upon existing debates (Callinicos, 2009, p. 25-6).[14] It is widely believed that Marx "did not use" the word "imperialism", although in fact he mentioned it at least once in a letter to Engels (Brewer, 1990, p. 25; MECW Volume 40, p. 72). However, it is true that Marx's work did not contain "a generic term to describe the rule of a more advanced nation state over a more backward area" (Brewer, ibid.), and when he uttered the 'i' word it had nothing to do with the understandings developed at the beginning of the 20th century. He did not associate imperialism with the preliminary signs of the move towards monopoly capitalism that he noticed in the development of limited liability corporations (LLC), and discussed in Chapter 23 of *Capital*, Vol. III (2013).[15]

The classical Marxist theory of imperialism is therefore an ensemble of different works and experiences which developed in the run up to WWI and during the conflict. Its authors came from a variety of professional and ideological backgrounds.

[14]In a reading of the 1872-75 French edition of *Capital, Vol. I* (Ch. 24), Lucia Pradella developed the argument that Marx had already drawn a "relationship between his crisis theory and the phenomenon of modern imperialism" (2013, p. 124). Perhaps better was 'was ignored by other thinkers'. The neglect of the falling rate of profit theory by 2nd& 3rd International Marxists is a mystery.

[15]Karl Marx did not have a theory of the state, but on several occasions he demonstrated a committed interest – although not to the same extent as Engels– on the strategies that played out on the European chessboard (MECW Volume 38, p. 463; MECW Volume 39, p 330; MECW Volume 40, p. 181; MECW Volume 12, p. 125).

Ironically, with Marx dying too early to put together the puzzle of his many intuitions, great credit for putting forward the vital elements of the classical Marxist theory of imperialism was to go not to a Marxist but to a liberal dissatisfied with the socio-economic conditions of his time, John A. Hobson (Cain, 2002, pp. 17-18).[16] Another example is Rudolf Hilferding, an Austro-Marxist. Austro-Marxism contained the genes of what then became the theoretical point of reference of Eurocommunism and the New Left, and the Austrian experience inspired the policies of governments of the UK Labour Party and Scandinavian Social-Democrats (see Donald Sassoon's definition of Austro-Marxism in his voluminous work on 20th century Western Marxism, 2010, p. 70; for a more comprehensive work on Austro-Marxism see Bottomore, 1978). A further development occurred through what Alex Callinicos called the "Lenin-Bukharin" synthesis. In fairness, some differences persisted between the two, particularly because Bukharin's work remains more comprehensive and accurate than Lenin's. For the latter, *Imperialism* (1939) was an opportunity to publish in the legal press. The pamphlet resulted from a commission by the "legal Russian 'Parus' (Sail) Publishers in Petrograd" "to write a booklet for the popular 'Pre- and Post-War Europe'" series giving a general characterization of the new epoch. To write "a popular outline" meant using a certain style of communication, and to write something "with an eye to the tsarist censorship" (p. 9) required, in Lenin's words, the use of "slavish tongue" (p. 7). Thus, *Imperialism* was also functional to Lenin's political aspirations and his efforts to proselytize (Arrighi, 1978, p. 19-21). Secondly, the purpose of writing something "scathing" about "those Marxists like Kautsky" was also relevant (Kiely, 2010, p. 59).

These writers were intellectuals and militants, but they came from different experiences – Hilferding was a paediatrician turned minister, Hobson a journalist, Lenin a revolutionary leader and Bukharin a communist intellectual. Their ideological positions ranged from views that lapped the boundaries of what later became Keynesianism to moderate and hardline Marxism. Their ideas for action were different. Hobson, Hilferding and Kautsky had a reformist approach, in contrast to the unequivocally revolutionary character of the other three: Luxemburg – with some

[16]Hobson used to say that he was "born and bred in the middle stratum of the middle-class of a middle sized industrial town in the Midlands" (1938, p. 15).

limits – Bukharin and Lenin. They had different national origins and were involved in different political experiences which intersected with their theoretical arguments.

Why, therefore, should one speak of a classical Marxist theory of imperialism? Despite differences, some extensive commonality existed. First of all, these thinkers worked in the same historical period, and all of them noticed a change in capitalism. Between 1870 and 1900, world GDP rose exponentially. Despite the Long Depression of the 1870s, heavy industry overtook light industry, becoming a central feature of industrial production in general, while the revolution in the technical base of production also brought a rapid increase in the size of enterprises. Hilferding, Bukharin, and Lenin wrote around the time of the start of WWI, and all of them acknowledged

> the formation of monopolies on a national basis, and the intensification of competition on a world scale between national groupings of capital. At the same time, they predicted an acceleration of capitalist development in backward areas of the world (Brewer, 1990, p. 20).

As Hobsbawm put it, industrialisation and depression were slowing the rate of profit and turning national economies into rivals, as "the gains of one [country] seemed to threaten the position of others" (1987, p. 42). More than at any previous time, the causes of inter-state violence during the era of imperialism at the turn of the 20th century were related to economics (Hobsbawm, 1987, p. 60; Wood, 2003). That is to say that a fundamental point of the Marxist theory of imperialism is the relevance of historical stages of development. However, the concept of stages was even more important in Lenin's version of the theory because he introduced the uneven development of capitalism as an element of his explanation of the rise and fall of states. In fact, a move towards monopolization stemming from the crisis, social pressures for protectionism, democratization and the rise of the armaments industry increased convergence between political and economics (Hobsbawm, 1987, p. 54).[17]

These thinkers noticed that state institutions and big capital combines were tied together in a symbiotic relationship. Although the growing transnationalisation of economics was an important feature in the decades leading up to WWI, even would-be

[17] Only Britain was different with regard to the first two issues (Hobsbawm, 1987, p. 39).

multinational corporations needed to "attach themselves to a suitably important national economy" (Hobsbawm, 1987, p. 42). All these thinkers provided an instrumentalist perspective in that their theories highlighted the primacy of economic over political forces. Like many who came after, they never engaged in a study of distinctive national peculiarities or geopolitical calculations, and in fact the Classical Marxist theory of imperialism was flawed in its attempt to extrapolate a universal theory from the particular (Callinicos, 2009, p. 10). If the first point offered by Lenin's version of the theory was that of the rise and fall of states, the second highlighted the close relationship between the apparatus of the capitalist state and ever growing businesses. The third point – very much Hobson's – was an acknowledgement that the economic logic of competition dragged the state into a spiral of tension with other states.[18] Eventually, this developed into a focus on military rivalries between states in the "Lenin-Bukharin synthesis" for the "re-division" of the world economy.

2.1.1. Imperialism: policy, system, or both?

It remains unclear whether Hobson treated imperialism as an inevitable structural consequence of capitalist overaccumulation or as a policy of individual economic interest. On the one hand, he seemed to focus on overproduction and overaccumulation as causes of imperialism, while on the other hand he treated imperialism as the consequence of people's savings – underconsumption. In fact, Hobson's non-Marxist approach was evident when he wrote that imperialism could cease if workers' salaries were increased. In a book which would nowadays sound very Keynesian, Hobson and Mummery wanted to "contradict the generally accepted dogmas that the saving of the individual must always and necessarily enrich the Community" (1889, pp. vii-viii). Instead, in *Imperialism: A Study* (1902) – the result of both academic publications and articles appearing in *The Speaker* (2002, Cain, p.

[18] Later in the thesis I define this the vicious circle of imperialism, by which I mean the fact that states, in pursuing the interests of big businesses, also strengthen their position – their GDP – *vis-à-vis* other states. In turn, a stronger state can help its businesses more effectively, and so on. Furthermore, by fulfilling the interests of their companies they realize geopolitical goals. This point is highlighted most clearly in Chapter 5'ssection on the Trans-Pacific Partnership.

82) – he seemed to adopt a more structural approach. For him the "taproot of Imperialism" lay in

> overproduction in the sense of an excessive manufacturing plant, and surplus capital which could not find sound investments within the country [which] forced Great Britain, Germany, Holland, France to place larger and larger portions of their economic resources outside the area of their present political domain, and then stimulate a policy of political expansion so as to take in the new area (1902, pp. 85-6).

This statement was probably where he moved closest to the position later taken by the other contributors to the Marxist theory of imperialism. But even in *Imperialism: A Study*, his concerns about savings remained, as when he asked "why does under-consumption or over-saving occur?" (1902, p. 87). This dilemma was evident in another passage about American imperialism, which he blamed on the lack of profitable investments for individual companies and not on the national economy as a whole. For him, the problem was the corrupt *modus operandi* of businessmen:

> Messrs, Rockefeller, Pierpont Morgan, and their associates […] needed Imperialism because they desired to use the public resources of their country to find profitable employment of their capital which otherwise would be superfluous (Hobson, 1902, p. 82-83; see also p. 100).

This is even more contradictory given that while Hobson highlighted the importance of racism and jingoism in regard to South Africa, he then went as far as to argue that American nationalism was just a film covering undemocratic pressure from lobbies on the government, while finance was "the governor of the imperial engine" (p. 66).[19] Hobson did not consider finance to be a structural feature of the world economy which served the purpose of opening up new spaces for profit absorption, but rather he seemed to foresee a great plutocracy, which "manipulates the patriotic forces which politicians, soldiers and philanthropists generate" (pp. 66-7).[20] At the same time, he treated imperialism as a necessary step for national economies to maintain a certain

[19]Hobson wrote more extensively on ideology in *The Psychology of Jingoism* (1901, pp. 1-14), but this work cannot be linked to my attempt to develop a political ideology of imperialism.

[20]It remains to be seen whether this is linked to his anti-Semitism – which can be seen in statements such as "Johannesburg is the new Jerusalem" and "the gold-mines of the Rand, are almost entirely in their hands", referring to the Jewish financial community (1900, pp. 190-1).

level of prosperity. He thus swung between the imperialism of particular interests of sections of the capitalist ruling class and the systemic, inevitable tendency to imperialism of capitalist economies, which at the turn of the century were developing fast, despite the crisis.[21] All considered, however, Hobson's remains a great contribution to the theory of imperialism, although he never saw it as a consequence of capitalism (Tarbuck, 1972, pp. 34-5).

The first to engage in the debate on the relationship between capitalism and imperialism was Rosa Luxemburg, who moved beyond Karl Kautsky's and Alexander Parvus' arguments about the need for national economies to find outlets for profits – although she took a similar position with regard to the spatial expansion of capitalism, as I discussed in Chapter 1. For Kautsky, capitalism needed peripheral agrarian markets; for Parvus this safety-valve function appertained to heavy industry like armaments, transport and infrastructure. Luxemburg explained that the problem of capitalism was that the system could not survive through "production for the sake of production", thus what she called a "third person" was necessary: a third social group in addition to the bourgeoisie and workers which could help to dispose of the many goods produced:

> The consuming power is furthermore restricted by the tendency to accumulate, the greed for an expansion of capital and a production of surplus-value on an enlarged scale. […] The market must, therefore, be continually extended […] (2003, pp. 313, 324; on the impossibility of realizing surplus-value, see p. 330).

Luxemburg's argument sounds powerful from a spatial point of view, and certainly non-capitalist regions – e.g. China – have proven very important to the expansion of global capitalism, although this is true only to a certain extent, as with parts of Latin America or the former USSR. Luxemburg overlooked the fact that capitalism often searches for pre-existing physical and economic infrastructures – as explained in Chapter 1. This is reminiscent of Ernest Mandel's paraphrase of Marx's concept of capitalist "warring brothers", describing how "accumulation by dispossession" often involves existing capitalist relations of production: "the capitalist class" enriches itself

[21]Even here, however, Hobson is contradictory, endorsing a watered down version of Social Darwinism (Callinicos, 2009, p. 169).

"by itself," that is, "certain layers of the capitalist class enrich themselves through the impoverishment of other capitalist layers" (1966).

Returning to the protagonists of the Classical Marxist theory of imperialism, Rudolf Hilferding – despite some hesitation – described imperialism as an endemic feature of capitalism (Tarbuck, 1972, p. 35). The conclusions of Hobson's argument are reflected in a flaw in the analysis of today's reformists stemming from a belief that a "good", "old" and "moral" capitalism exists in contrast to a "bad", "new" and "immoral" one. However, Arrighi's *The Long Twentieth Century* (1994) is illuminating in unmasking how there are not different capitalisms with different qualities, but different phases of accumulation. There is a similar issue with Hilferding's account, as while he went beyond the limits of "imperialism as policy" in confirming the eclectic nature of the Marxist theory of imperialism, he still believed in a certain degree of difference between old and new capitalists:

> the old free traders believed in free trade not only as the best economic policy but also as the beginning of an era of peace. Finance capital abandoned this belief long ago (Hilferding, 1981, p. 335; see also Callinicos, 2009, p. 36).

The former minister in the Weimar Republic could probably not rid himself of his overall ideological approach to Marxism and socialism. The problem mostly came down to the fact that as an Austro-Marxist Hilferding understood the phase of monopoly capitalism as a time of opportunity for a turn to socialism, provided by the fusion between state and capital: "[T]he socializing function of finance capital facilitates enormously the task of overcoming capitalism" (1981, p. 367). Put simply, because state and capital had become one homogeneous entity, it was enough to win a parliamentary majority for socialist elites to assume political control. In a speech to the SPD Conference in 1927, Hilferding explained that:

> Organised capitalism thus means in effect the replacement of the capitalist principle of free competition by the socialist principle of planned production(italic in original; in Sassoon, 2010, p. 51).

Despite Hilferding's strategic vision, what has become "seminal" is the observation that competitive, dynamic and pioneer capitalism entered a stagnating and monopolistic phase (Bideleux and Jeffries, 1998, p. 362). In any case, this represented

a step forward from Hobson, and Hilferding ultimately believed that "capital can pursue no other policy than that of imperialism" (1981, p. 366). Hilferding's idea of the transformation of capitalism was clearest in *Der Funktionswechsel des Schutzzolles*, where he pointed out the following by looking at the experience of Germany:

> To combat the fall in the rate of profit, this law of motion of capitalism, capital does away with free competition, organizes itself and through its organization is put in a position to increase its influence through state power, lacing it immediately and directly in the service of its interest in exploitation (quoted by Howard and King, 1989, p. 95; see also Hilferding, 1981, p. 315).

On this, Hilferding followed Marx's insights into the transformations that signalled the rise of joint-stock companies and his theory of the concentration and centralization of capital (1981, pp. 107-129). The rise of finance capital (*Finanzkapital*) meant a shift in the ownership of wealth and the "dependence of industry on the banks" (Hilferding, 1981, p. 225). In this it lies Hilferding's originality, although his analysis with regard to Germany and the United States was realistic, but not with regard to England (Callinicos, 2009, p. 48).[22] However, Hilferding did not develop the significance of his findings into the realm of international politics, even though he stated that capitalism pushes for a maximization of territorial space (Hilferding, 1981, p. 326; Brewer, 1990, Chapter 5).

This is the point where Lenin's contribution began, a fusion of Hobson's and Hilferding's work placed in the context of a global perspective on capitalist development, as I described in Chapter 1. Lenin argued that because of the "crisis" (1939, p. 46), "free competition gives rise to the concentration of production, which, in turn, at a certain stage of development leads to monopoly" (p. 20). The concept of "monopoly" itself was problematic. Eric Hobsbawm noted that while "a tendency towards monopoly or oligopoly is undeniable in the heavy industries" it is "too simplistic" to use the word monopoly (1987, p. 44). Mandel defended Lenin, arguing

[22]Lapavitsas (2013, p. 67-8) has questioned Hilferding's argument about the fusion between banking and the industrial sector; see Harvey (2005, p. 32) on the fusion between managers and shareholders and the consequent interest in boosting stock asset value as a way of financing; Nowell (2009, p. 324) has argued that retail companies have their own financing, undermining Hilferding's claim .

that “monopoly” needed to be considered more flexibly than did scholars who criticized the Classical Marxist theory of imperialism.

> In calling the structure of contemporary capitalism monopolist, Marxists [...] simply stated that the relationship of forces between the small firms, and one, two or three giant firms is such that the latter impose their law in the industry, that is, eliminate price competition (Mandel, 1966).

Similarly, others have argued that while pure monopoly is “nonexistent”, it is a concept that can be employed to describe those firms which have enough “monopoly power” to manipulate the market in their favour to control production, prices and access (Foster and McChesney, 2012, p. 66).

2.1.2. Imperialism: rivalry or peace?

There is one important reason why Hobson remains so important in the discussion of a Marxist theory of imperialism. His thoughts enclosed different themes – maybe developed with some contradictions or limits – which were developed with more accuracy by others.
The main argument put forward by Hobson was the inherent rivalry-prone posture of capitalist states. Reporting on the Second Boer War (or Second South African War, 1899-1902) for *The Manchester Guardian*, Hobson spelled out clearly what was at stake in that conflict. Two politico-economic blocks faced each other, hoping to grab the precious South African mines:

> A few of the financial pioneers in South Africa have been Englishmen, like Messrs, Rhodes and Rudd; but recent developments of Transvaal gold-mining have thrown the economic resources of the country more and more into the hands of a small group of international financers, chiefly German in origin and Jewish in race. By superior ability, enterprise, and organization these men, out-competing the slower-witted Briton, have attained a practical supremacy which no one who has visited Johannesburg is likely to question (1900, p. 189).

For this thesis, the quote is important to the extent it contains an example of Lenin’s idea of rivalry. As early as 1900, Hobson highlighted the collaboration between

national enterprises and their respective states and competition for resources and markets in the international arena. More precisely, he noted that the powerful pressures of capitalism did not just take over institutions, but also intersected with the complex bargaining taking place inside government:

> greater complications of foreign policy, greater centralisation of power, and a congestion of business which ever threatens to absorb and overtax the capacity of parliamentary government (1902, p. 132).

However the political outcome of this clash of state-monopoly alliances was not the same as that highlighted later in the work of Lenin and Bukharin, where state competition followed economic competition. Hobson admitted that a division of the world in empires, potentially was a setting that "would offer the best hope of permanent peace on an assured basis of inter-Imperialism" (p. 1902, p. 351).[23] However, this once again highlighted Hobson's reformism and faith in great powers cooperation. Hilferding stressed this aspect more explicitly linking imperialism to the growing concentration and centralization of capital and the merging of industrial and financial capital into what he called "finance capital". Not only was the centralization of money made available by the latter indispensable to the former; banks probably saw a monopolized economy as being safer for their money than a competitive one. The merit of Lenin and Bukharin was to merge two of the three pillars of the classical Marxist theory of imperialism into a more coherent framework: the idea of state rivalries over markets and resources first spelled out by Hobson, was fused with the tendency towards monopoly capitalism of the decades preceding WWI, borrowed from Hilferding. Lenin acknowledged the influence of Hobson's work in his theory of imperialism (1939, p. 7). Instead, Lenin took from Hilferding the idea that the concentration of capital transform banks into "institutions of a truly universal character" (ibid., p. 44) – meaning that they can control different fields of industrial production. Financial giants then gain the political strength to impose their own foreign policy agenda: "a monopoly, once it is formed and controls thousands of millions, inevitably penetrates into every sphere of public life, regardless of the form

[23] "Ultra-imperialism, or super-imperialism, [was] what Hobson, thirteen years earlier, [had] described as inter-imperialism. Except for coining a new and clever catch-word, replacing one Latin prefix by another, the only progress [that] Kautsky has made, in the sphere of 'scientific' thought, is that he gave out, as Marxism, what Hobson, in effect, [had] described as the cant of English parsons" (Lenin, 1939, p. 117).

of government" (p. 58). This entanglement between the state and monopolies was so profound that Lenin spoke of the existence of "four international banker countries" (p. 61). This is the point of departure from Hilferding's work. Lenin wrote of the "richest capitalist countries" (ibid.) and their politico-economic spheres of interest that

> the capital exporting countries have divided the world among themselves in the figurative sense of the term, but finance capital has also led to the actual division of the world among capitalist combines (p. 67, Ch. 5).

Bukharin was more precise on this point than Lenin. The difference between Lenin and Bukharin was that the first emphasized the effects of uneven development on the balance of power between European states, while the second focused on the many "state-capitalist trusts" driven by competitive pressures to meddle in international business. Bukharin applied Hilferding's discourse to the international level as he looked at marine transportation, the diffusion of electrical energy and the consequent movement of people on the one hand and at the increase in exports following a fall in profits on the other hand:

> In various ways [through loans, participations, and financing of foreign enterprises] there thus takes place the transfusion of capital from one "national" sphere into the other; there grows the intertwining of "national capitals"; there proceeds the "internationalisation" of capital (ibid., pp. 41; pp. 28, 35, 39, 40).

For Bukharin, this internationalization caused increasing competition between cartels, which then turned to their states in order to receive support (1972, pp. 40-52, Chapter 2 and 3). Competition required big businesses to lobby for state help, starting from protectionist policies – "the economic policy of the cartels as formulated by the state" (1972, p. 75). The result was the development of a symbiotic relation between the state and monopolies, which "intensified the tendency to 'nationalize' capitalist interests, to form 'national' groups armed to the teeth and ready to hurl themselves at one another any moment" (p. 107). But for Lenin, while the limits of domestic markets could be escaped by dividing global markets into spheres of economic influence, once the world economy had been divided, the only way to overtake these politically determined limits was tore-divide the world, especially "if the relation of forces changes as a result of uneven development, war, bankruptcy, etc." (Lenin, 1939, p. 70). Bukharin did not engage with uneven development, but in addition to what Lenin

argued, he described the state as being increasingly involved in economic and political affairs. First there was a "moment of penetration" of the state by financial oligarchies, but "at some point the trust cedes power to state" (1972, p. 125).

This argument has two implications for the discussion of state theory that will be developed later in this chapter: one is what is known nowadays as a "revolving door", the smooth change of position from a top job within the world of corporations to political and bureaucratic appointment; the other is the consolidation of the fact that the fortunes and misfortunes of states and monopolies become tied to a similar destiny and that a strong political leadership is necessary to recreate economic opportunities. Bukharin stresses this further in the next passage, where the state is described as an independent strategist for capitalist economic interests:

> [E]conomic evolution, fortified at this point by the war, must and does lead to a situation where the bourgeoisie as a whole is more tolerant regarding monopolistic interference by the state power. […] The interests of the state and the interests of finance capital coincide more and more. On the other hand, a maximum of centralisation and a maximum of state power are required by the fierce competitive struggle on the world market (1972, p. 155).

This was followed by great expansion of the state's military budget and social power (1982, p. 16; see also p. 22).[24] However, neither Bukharin nor Lenin provides a more specific sense of how the re-division of the world into areas of influence occurred. As Brewer said, Lenin's work lacked interconnections (1990, p. 117), and it can clearly be extrapolated from these works that what Lenin's calls "re-division", and what for Bukharin was international competition between states, represented a moment of political accumulation whenthe pursuit of an increase in geopolitical power was not necessarily in a direct relation with business interests, but was certainly aimed at recreating and maintaining the structural conditions of profitability.

[24]Bukharin refers to Prime Minister Lloyd George and the legislation ceding full power to the government (1972 p. 151).

2.1.3. In defence of Hobson and Lenin

Despite some of Hobson's contradictions and Lenin's lack of focus on nuances, the theory still stands up against the critique raised by those who rejected the economic logic behind imperialism. In various works, these scholars attacked the theory, particularly Lenin's version, for its inconsistency between international trade and imperialism. For Barratt Brown the problem was that

> monopoly and finance capital were not the chief cause of the outward pressure into empire, at least for Britain, [...] [and] that the imperial tribute never played so important a role in Britain life […] (1970, p. 13).

Barratt Brown admitted that Lenin was right about Germany before 1913 and "the whole capitalist world in the 1930s and 1950s", but not about Great Britain (ibid., p. 453).[25] Similarly, Fieldhouse was sceptical about the link between capital's search for outlets and the territorial expansion which was central for Lenin and Hobson (2006, p. 131). For Fieldhouse, "Hobson had in no sense proved that there was any connection between the investments made overseas and the territory acquired contemporaneously" (2006, p. 128).

Barratt Brown's and Fieldhouse's concerns were legitimate but flawed by their own economic determinism. First of all, Hobson had revealed the issue raised by Barratt Brown and Fieldhouse:

> It has indeed been proved that recent annexations of tropical countries, procured at great expense, have furnished poor and precarious markets, that our aggregate trade with our colonial possessions is virtually stationary, and that our most profitable and progressive trade is with rival industrial nations[...] (1902, p. 76).

It appears clear from Hobson's words that the imperative of expansionism often did not overlap with direct economic interests. But what the critique is missing here is that the legacy of the Classical Marxist theory of imperialism extends beyond the

[25] It was shown that coalitions of companies lobbying for free trade grew both in numbers and in geographical distribution during the 19th century (Schonhardt-Bailey, 1991, pp. 38, 52). For a critical view of the power of Manchester's textile industry see Cain and Hopkins (2016, pp. 313-5).

economic into the political. The value of the theory is a political conclusion to an economic narrative:

> It is easy to misunderstand the classical Marxist theories of imperialism [...]. Today, the word 'imperialism' generally refers to the dominance of more developed over less developed countries. For the classical Marxists it meant, primarily, rivalry between major capitalist countries [...]. (Brewer, 1990, pp. 88-9).

First of all, Barratt Brown and others were quick to draw conclusions, overlooking the legacy of Lenin's and Hobson's theories. While looking at patterns of foreign direct investment is an essential element of many investigations in global political economics, to obsess over data seems naive, as it might risk delivering a reductionist, narrow conclusion. Instead, territorial expansionism was the best possible way for state managers to support both their monopolies and national economies, as geopolitical control could increase leverage overeconomic matters. Hobsbawm explained that disputes over apparently unimportant pieces of land, such as the "Congo basin" or a "Pacific atoll", intersected with opportunities to grant one country's enterprises a monopoly of resources or to force their access into existing or potential markets or deals (1987, p. 66). The Classical Marxist theory of imperialism therefore did not necessarily argue that each new conquered land was an "Eldorado" (p. 67). Secondly, the need for expanding markets was accelerated by the political ideologies of the time and entrepreneurs' adventurism, as well as by the nationalist excitement which political elites brandished, and it is not unlikely that they pushed for territorial expansion even when it was less necessary economically speaking (Hobsbawm, ibid., p. 70). Thirdly, while territorial expansion was triggered by economic pressures, it continued because of a geopolitical race which made cost-benefit analysis increasingly difficult, as military resources followed a geostrategic logic according to which apparently unimportant lands could provide influence over more important regions or trade routes (for example, China's maritime claims in the South China Sea can be explained by all of these factors). This was particularly important for Great Britain. Last but not least, it was also argued that colonies had an implicit economic advantage, in contrast to what sceptics about the theory thought, particularly with regard to India:

> The colonies nevertheless played a vital economic role. India provided Britain with an annual tribute in the shape of the directly extracted 'Home Charges', along with a trade surplus, interest on investments and other invisible earnings. According to Berrick Saul 'Britain settled more than one-third of her deficit with Europe and the United States through India' (Callinicos, 1994, p. 24; Arrighi, 2005, p. 64-5).[26]

A second kind of criticism was made by John Gallagher and Ronald Robinson in *The Imperialism of Free Trade* (1953) and *Africa and the Victorians* (this co-authored with Denny, 1961).[27] They not only rejected Hobson's historical periodization of imperialism – saying that he was wrong to see a new phase starting from the1870, but also asserted that the partition of Africa was undertaken for strategic rather than economic reasons, such as to protect the routes to India and support settlers' demands (1961, p. 2). However, this was not inter-imperialist logic; rather Gallagher and Robinson claimed that the cause was socio-political events which threatened British interests, such as "nationalist crises" in Africa:

> The compelling conditions for British advances in tropical Africa were first called into being [...] by the collapse of the Khedivial regime in Egypt (1961, p. 465).

Political explanations of this sort should not be treated as mutually exclusive with the central elements of Lenin's theory. On the contrary, they show that the expansion of economic interests intersected with various ideological, strategic and social concerns. These comments should also apply to Eckstein's questions about "chronology; locale; causation" (1991, p. 299), a critique which suggests to me not that the theory should be delegitimized as a whole, but rather that it needs refinement to include more accurate lenses of analysis. Because of its lack of specificity, Anievas argued that the theory is flawed by "unit homogenization" (Anievas, 2014, p. 32). While this critique captures part of the problem that I will try to address in this work – which is the difficulty for theories of imperialism to provide a detailed analysis that goes beyond a structural explanation of geopolitical events – it also seems heavily unfair. In fact "unit homogenization" is a widely acknowledged feature of realism – see Agnew at

[26]In the case of France, the majority of investments went to less industrialized areas (Serfati, 2015, p. 56).

[27] For more recent interpretations of this view see Kiely (2010).

the beginning of Chapter 3. Given the global perspective that underlines the classical Marxist theory of imperialism the latter offers more than realism in terms of contents but also a method to be adjusted to a changing world order.

2.1.4.The neo-Gramscian and Kautskyian perspectives and US-China relations

A further challenge to Lenin's theory of imperialism stems from the objective trend of systemic and hegemonic peace arose from the ashes of WWII. This is a legitimate critique which can undermine the Hobson-Lenin-Bukharin thesis. This challenge is especially evident in the neo-Gramscian tradition which translated Gramsci's work in a theory of International Relations – even though this viewpoint is also contained in Kenneth Waltz's attack on Lenin.

The question is whether it would be possible for the theory of imperialism to make sense of the so-called *Pax Americana* and the lack of formal empire in recent decades. In all truth, both Lenin and Bukharin predicted the rise of a 'Kautskyian moment' – 'ultraimperialism' – characterized by economic integration and political peace but under the dominance of a powerful cartel. In his introduction to Bukharin's book, Lenin acknowledged this: "no doubt that the development is going in the direction of a single world trust that will swallow up all enterprises and all states without exception" (Bukharin 1972, 14). However, he also believed that "before a single world trust will be reached, [...] imperialism will inevitably explode [...]" (Bukharin 1972, 14). If this exert confirmed Lenin's far-reaching intellectual views, it is also evidence of his ideological use of theory. Lenin, like many comrades, had an unquestioned faith in the end of capitalism.

Bukharin instead, because of his focus on the internationalisation of capital, came very close to predict the kind of world order the United States and its Western allies were able to set up after WWII, and even more so after 1989. Like the neo-Gramscian scholars, he imagined that the capitalist ruling class could find an international "solidarity of interests" in "the common ownership of securities" and "collective property" which could bring to "the formation of a golden international" (Bukharin 1972, 62) or "an all-embracing power which had conquered all the others" (1972, 142). But much like Lenin, Bukharin believed – or hoped? – that this tendency could be "counteracted by a still stronger tendency of capital towards nationalization"

(Bukharin 1972, 138) and "the forces that are hostile to imperialism" (Bukharin 1972, 142).

Compared to Lenin and Bukharin, Trotsky was much closer to Kautsky even though his prediction was more accurate. While Trotsky's also foresaw a phase of ultraimperialism, contrarily to Kautsky he offered a tangible illustration of the historical phase that would have emerged after WWII.

What transpires from his analysis is that as early as the Washington Conference (1922) the US already laid the material conditions for the coming new order as America was overtaking Britain's military power. The treaty

> [...] called for each of the countries involved to maintain a set ratio of warship tonnage which allowed the United States and Britain 500,000 tons, Japan 300,000 tons and France and Italy each 175,000 tons (US Department of State).

Observing the development above described, Trotsky commented that it was the US that was leading the making of a new order based on an interlocking of politico-military and economic factors,

> What does American capitalism want? [...] it wants to establish an American imperialist autocracy over our planet. [...] It must, they say, pacify Europe. How? Under its hegemony [...] This means that Europe will be permitted to rise again, but within limits set in advance, [...] (Trotsky 1924b).

This new order in fact had to be peaceful for a Wilsonian grand design to succeed:

> What is this? This is "pacificism." But it is pacifism of a sort that imposes its will by dint of monstrous economic superiority and prepares "peacefully" military superiority in the next historical period" (Trotsky 1926).

Trostsky's position with regard to inter-imperialist rivalry however, was slightly more compromising than that of Kautsky and Lenin. In fact, he stated several times that US hegemonic bid was producing inter-imperialist tensions, particularly between American and British interests. For him, this was "the main world antagonism" (Trotsky 1924a). Trotsky added that

> It is not very likely that the bourgeoisie of all countries will consent to be shoved into the background [...] Military conflicts are inevitable. The era of

> ‘pacifist’ Americanism that seems to be opening up at this time is only a preparation for new wars of unprecedented scope and unimaginable monstrosity (Trosky 1924a).

Probably, his prediction of inter-imperial tensions within the Anglosphere turned out to be wrong since the start of WWII because Britain considered that the prospect for German hegemony was less desirable than the success of the United States. Regardless of some of the nuances highlighted above, it is evident that the post-WWII order is, put simply, more neo-Gramscian or Kautskyan than Leninian. Failure to think seriously about ‘ultraimperialism’ was a mistake that highlights the partisan approach to social analysis among turn-of-the-century Marxist thinkers. However, it would be intellectually wrong to argue that this trend undermines the structural value of the theory of imperialism, even during the post-WWII era and above all in the post-2008 conjuncture:

> One should not seek to associate either imperialism itself or a particular phase in its evolution with one specific paradigmatic model of capitalist development. Different models may coexist within the same phase (Callinicos 2009, p. 70).

Callinicos’ point implies that geopolitical competition disappeared only to a certain extent. This is particularly important for investigating imperialism from the perspective of American grand strategy and the tension between national and universal interests. The hegemonic phase that Lenin and Bukharin refused to see was built upon a “Lockean-heartland” (Pijl 2012) inspired by the Wilsonian mantra of a world of independent and peaceful nations which privileged business over war. This world order was constructed upon the US principle of ‘open doors’ and ‘closed frontiers’ (Colas 2008) – enforcement of free market through the promotion of (Western) national sovereignty – allegedly reproduced with a kind of imperialism that puzzled scholars in search of a definition –as discussed in Chapter 1. Echoing *Empire* but from a less black-and-white perspective, Leo Panitch and Sam Gindin argued that US geopolitics was not driven by a national interest, instead by the pursuit of an open world order devoid of barriers to ‘capital accumulation’ (2012:11). This portrait however lacked important nuances about the world order and US grand strategy. In their very partial interpretation of Gramsci’s writings, neo-Gramscian

scholars overlooked that American grand strategy has never been purely hegemonic. In fact, as other passages quoted in this thesis show (Smith 2003, 7; Agnew 2003a, 877–880; Agnew 2003a, 882) American grand strategy has never resolved the inner tension between (geo)political coercion and (geo)economic universalism.

Even somebody like Kees van der Pijl had to admit that the "US geopolitical goals continued to be framed within a basically sphere-of-interest concept that took the division of the world market for granted" (2012, 27). The salient point is that while US grand strategy was always envisioning a world without barriers to trade, it attempted to shape an open world market in its own image, according to a logic of selective mercantilism which favoured US strategic and competitive companies – as recently seen in the centrality that Information Technology (IT) industries had in the negotiations for the Trans-Pacific Partnership. The result of this hegemonic bid was less smooth and more uneven than many neo-Gramscian think. Reagan-sponsored 'voluntary export restraint' (VER) on Japanese automakers, Germany's and France's limited acceptance of US hegemony in foreign economic policy and defence policy, in addition to the 'determination' of several countries 'not to let globalization become the same thing as Americanization' (Smith 2005:193), undermine Panitch's and Gindin's view of the US as guardian of a capitalist order based on a consensus achieved through the spread of benefits among ruling elites of different states. As demonstrated by the US suspiciousness with regard to the rise of China, if anything the US has been the guardian of a capitalist order which has benefited its economy.

These observations have theoretical implications for the arguments of neo-Gramscians and it compels scholars to re-evaluate the Hobson-Lenin-Bukharin synthesis. If Robert Cox's definition of hegemony means power without violence, this seems a mistaken interpretation of Gramsci. The meaning of hegemony is often misunderstood among neo-Gramscian and Marxist alike because of the economic reductionism that is in their intellectual genes. Gramsci did not think that hegemony does not need coerciveness. He stated that there was a "combination of coercion and consensus". Furthermore, he stated that within the concept of *rapporti di forza* there are different "moments" or "degrees", at least three. One of these is a "politico-military" moment which is seen by Gramsci as essential for the reproduction of social structures (Gramsci, Q1, 48).

If Cox's definition of hegemony means a world order that is "universal in conception" (1983, 171) and aims at representing US dominance after WWII, it offers an Eurocentric or a trans-Atlantic-centred viewpoint. Between 1946 and 1989 this hegemony failed to reach a huge chunk of the world. Since the Cold War ended, instead, US hegemony has been increasingly challenged by states which actually adopted that economic system – capitalism – that Cox defines 'compatible with their interests' (Cox 1983, 171). Particularly if one looks at Russia and China but also Germany, it is worth asking to what extent US hegemony performed 'like a pillow' and charmed 'the would-be assailant' (Cox 1983, 173).

China's and other Asian states' challenge to the US-led global governance means that one must rethink the idea that hegemony is 'an order within a world economy with a dominant mode of production' (Cox 1983:171), given that the challenge to the current world hegemon is all internal to the same regime of accumulation – despite evident differences between Chinese and American capitalism. More to the point, post-2008 events challenge the idea that international politics is a "second-order alienation" of capitalism (Rupert 1993, 84), a still very reductionist way of theorizing the superstructure. Instead, it seems more interesting Gramsci's idea that in international politics "the line of development is toward internationalism, but the point of departure is 'national' – and it is from this point of departure that one must begin" (Gramsci, 1971, p. 240). If this, as somebody suggests, it "entails a critical reconstruction of the *historical interplay* between socio-political processes within particular states, and global relations and processes" (Rupert 1993, p. 85), then the neo-Gramscian approach can have more to say with regard to inter-state rivalries. Otherwise, the perspective of world order as dominated by successive forms of "international historic bloc*"* (Gill and Law 1993, p. 96) is at odd with the economic emulation, interdependence and at the same time hegemonic challenge between the US and China. In fact, in the US-China relation one finds two competing models of regional (political) governance despite both countries resorted to a similar regimes of (economic) accumulation.

This is a further evidence that a Marxist theory of IR should focus on national governments, which is what Lenin's theory of imperialism can offer, with three precautions. Firstly, because objectively the post-WWII order was void of systemic wars, the phrase "inter-imperialist rivalries" should be substituted with 'geopolitical competition'. It is from "the apparent absence" of great powers conflicts that stems

the misleading idea about international peace (Callinicos 2007, p. 537). Secondly, it is a misunderstanding to define imperialism only as "the baleful influence of the strong over the weak", which is how Waltz (1979, p. 36) thought about Lenin's theory of imperialism. Instead, the Marxist theory of imperialism "refers to [...] rivalry between major capitalist countries" (Brewer, 1990, pp., 88–9). Therefore, Waltz's point about an "effort to save Lenin's thesis" done by second-wave theories of imperialism (Waltz, 1979, p. 34), denotes a misunderstanding of Lenin's theory both by him and some scholars of the second-waive of debates on imperialism. Thirdly and most importantly, this thesis' critical acknowledgement of a hegemonic phase paired and supported by a solid sovereign state with its nationalist grand strategy and global military foothold, is an invitation to view imperialism neither as the product of individual nation-states nor as the ancestor of an empire of capital *a la* Negri. Rather, imperialism is 'on the one hand, a general feature of capitalism as a global political economy … On the other hand, imperialism is a particular practice of individual states' (Serfati 2015, p. 53). This is important with regard to the debate with Kaustskyians and neo-Gramscians. If anything, what current US-China relations reveal is that on the one hand economic interdependence under a regime of global capitalism generates peace to the extent some states really seem to be interlocked with one another. China, just to make an example, has poured a skyrocketing amount of FDI into the American market, while absorbing America's debt and buying a great part of what the US exports. On the other hand, however, Kautskyians overlook the fact that this interdependence is at the same time creating systemic tensions. From an economic viewpoint, China has become over the decades a job killer in some American economic sectors. Furthermore, it has acquired a structural ownership of America's debt, opening a potential area of economic and political vulnerability in the American state.

From a geopolitical viewpoint, China has become increasingly assertive with regard to 'core interests' that challenge the post-WWII order. In addition, US-China interdependence has created an issue of technology transfers. Therefore, this thesis' author doubts that the Kautskyian and neo-Gramscian view can theorize this. However, it invites scholars to take into account the utility of adopting both Kautskyian and Leninist lenses in order to make sense of an inter-state relationship – the one between US and China – that offers patterns of both amity and enmity on a systemic scale.

2.2. The state debate

Two general perspectives on the relationship between state and capital can be extrapolated from the discussion of the classical Marxist theory of imperialism. Arguing against Lenin's views, Kautsky, Bernstein and Schumpeter saw imperialism not as an outcome of the capitalist mode of production, but rather as the consequence of greedy elites or of Hobbesian, atavistic forces present in human beings – Schumpeter defined imperialism as "non-rational and irrational" (Callinicos, 1994, p. 18). In doing so, these authors absolved capitalism (p. 19). Nonetheless, both Lenin's and Kautsky's approaches have some overarching weaknesses in their explanation of state power. Chris Harman noted that the consequence of Kautsky's view of the state is that the actions of politicians are irreconcilable with capitalist interests and capitalism (1991).Instead, with Lenin's approach there is a risk of concluding that one size fits all:

> The forms of oppression maintained by the state are seen as flowing directly from the accumulation needs of capital. There can be no clash between them (1991).

Understanding the nature of the state, its relation with the capitalist ruling class and the socio-political complexities that a diverse society poses for capitalist interests is crucial if the theory of imperialism is to be improved, and even more so given that discussions of imperialism as geopolitical rivalry were abandoned for some decades between the end of WWI and the end of the 20th century. According to Nicos Poulantzas, this was caused by the reductionist dogma of the Third International and was the fault of Stalin (Martin, 2008, p. 173).
It was Poulantzas himself who attempted to move forward from economic reductionism, particularly after the intervention of Ralph Miliband. In *The State in Capitalist Society* (1969), dedicated to Charles Wright Mills, Miliband drew extensively on Gabriel Kolko. His book remains today a bible for educated militants and critical citizens, although it did not attempt to uncover new theoretical insights from the interstices of Karl Marx's extensive opera, but reproduced *ad literam* the sense of the state that came from *The Communist Manifesto* (1967) best enclosed in this famous quote:

> The executive of the modern State is but a committee for managing the common affairs of the whole bourgeoisie (p. 5).

The problem with Marxist elitism – highlighted in the methodology – is three-fold. Firstly, drawing a causal relation between big business and politicians' choices makes it represents a rigorous scientific method which, however, misses out on important nuances. Secondly, this account overlooks conflicting interests between state and ruling classes. Thirdly, it has little to say about the everyday conduct of foreign policy strategy.

Nicos Poulantzas rejected Miliband's argument and developed what he considered "the only solution" for a Marxist theory of state autonomy (Block, 1980, p. 227). This solution was astute to the extent that he moved away from Miliband's focus on the capitalist ruling class and shifted attention to the long-term health of capitalism. In other words, Poulantzas abandoned the economy of the ruling class – the realization of direct, tangible interests – and analysed the politics of capitalism, the planning of long term solutions to the structural limits of profitability. In his discourse, the state is a referee which maintains social order – even if this means going against individual, short-term bourgeois interests – but whose policies in the long term help prevent social and economic crises – in this sense the Federal Reserve's interest rates policy follows Poulantzian logic. In Poulantzas' account, the state "sets the limits" of capitalist accumulation in order to curb the self-destructive logic of individual capitals (1973 p. 187). The state's purpose is to "disorganize the dominated classes politically, and at the same time to organize the dominant classes politically" (ibid., p. 189). For Poulantzas, the state's autonomy is "relative" to the extent that a government "does not directly represent the dominant classes' economic interests" but is the "organizing agent of their political struggle" (ibid., p. 190). Developing this clever *escamotage* however does not resolve some questions about Poulantzas' work. First, although this may sound like a semantic matter, Poulantzas managed to go beyond what he called "economism", as in his conception the action of the state is clearly not driven by a logic resembling that of private capitalists. However, "instrumentalism" remains, because in Poulantzas' work the state is still a machine which serves the ruling class. Poulantzas' rejection of this accusation sounds too tautological:

> It is true that the political and economic struggles of the dominated classes impose this on the capitalist state. However, this simply shows that the state is not a class instrument, but rather the state of a society divided into classes (ibid., p. 191).

My point is to say that in certain countries state managers not only attempt to act in the interest of capitalists, but aim more generally at consolidating the economy of their own state, which in a competitive global economy means fighting against other states.

Secondly, Poulantzas considers the relation of power between government and ruling class from only a domestic perspective. With regard to this, I find a little noticed passage in Miliband's book more helpful, which in referring to the age of empire states:

> It is certainly not true that these governments went into Africa or Asia simply to serve powerful economic interests. [...] But here too the many other purposes which governments have wished to serve in their quest for empire have involved, preeminently, the furtherance of private economic interests. They may really have been concerned with national security, the strengthening of the economic and social fabric, the shouldering of the white man's burden, the fulfilment of their national destiny, and so forth. But these purposes required, as they saw it, the securing by conquest of lands which were already or which could become zones of exploitation for their national capitalist interests, whose implantation and expansion were thus guaranteed by the power of the state (1969, p. 84).

This passage is very important because it is where Miliband showed how economic pressures intersect with political variables, something which remained partially unexplained in classical Marxist theory. In particular, Miliband hinted at the importance of state managers in maximizing power in a capitalist-driven manner.

A third issue with Poulantzas' work is that in contrast to Miliband he does not explain why the state should organize the bourgeoisie and why should it be like this if the state and the bourgeoisie are not tied into the kind of relationship described by Miliband. Fourthly, Poulantzas' work does not allow room for the various strategies of different governments, which is an important theme in Chapter 3 of this work.

Ultimately, Poulantzas avoids the problem of state managers' ideological and power-driven calculations aimed at consolidating the economic power of their country and, indirectly, of the country's bourgeoisie. In fact, even if Poulantzas' argument were perfectly correct, political elites could still adopt an infinite number of strategies in the long-term interests of the bourgeoisie, depending on the additional complexities of democratic politics, social discontent, economic crises, geopolitical concerns, party politics, identity etc. With regard to this, it is interesting to recall Otto von Bismarck's experience, which Poulantzas gives as the most important example (1973, p. 180). For Poulantzas, the Prussian leader was completely detached from society, but for some unknown reason he was concerned with the interests of the bourgeoisie. He describes Bismarck as a *deus ex machina* who suddenly emerged to remove the territorial obstacles which capitalism encountered in a fragmented Germany. Instead, I find that Bismarck's power resulted from the intersection of various factors which the first three chapters of my work aim to combine. Bismarck was in no way alien to social groups, as he enjoyed the support of a class alliance – the 'Rye and Iron' – which was concerned with two chief consequences of the uneven geographical development of capitalism: the mounting class-conflict and the economic crisis (Torp, 2010, pp. 401-9; Dorpalen, 1985, p. 253). Meanwhile, Bismarck appeared on the political scene as a charismatic individual strongly concerned with *raison d'état*. Even before becoming chancellor, he was afraid that a weak monarch – whom he wanted to support in a Mussolini-style march on Berlin – was incapable of defending the monarchy, not only from internal social threats but also from external military pressures. In addition, Bismarck's affinity with social Darwinism was amplified by the events described by Engels in *The Role of Force in History*, which are overlooked by Poulantzas (Pflanze, 1963, p. 89). Prussia and the rest of Germany were afflicted by the frustration produced by the Paris Peace Congress (1849), where Germany had experienced its first "Versailles" when the whole nation was treated "*en canaille*" (italics in original, Engels, 1990, p. 462). Engels made it clear that the rise of a rampant bourgeoisie also frustrated by the territorial fragmentation that constituted the German question was multiplied by Bismarck's calculation and the dominant dynamics of international relations in central Europe (Engels also similarly considered Louis Napoleon, p. 462). At the beginning of his *pamphlet*, Engels laid out the development of the historical context, starting from the 1815 Vienna Congress, where Europe had been

> partitioned and sold off in a manner which revealed to the whole world the complete ineptitude of the potentates and statesmen (p. 457; see p. 460).

The concomitant rise of the bourgeoisie and its interest in a unified German market intersected with a set of geopolitical challenges and opportunities, frustrations and historical memories, all interiorized by a charismatic political leader. While the political order risked being undermined by the economic crisis and class conflict on the one hand and external pressure from France and Austria on the other, Bismarck found the solution to Germany's problems in national capitalism and four interconnected facets of power similar to those theorized by Weberian scholar Michael Mann – economic, social (domestic security), ideological and military. For Bismarck, not moving Prussia and Germany onto the path of capitalism would have been like continuing to equip its army with siege weapons when all rival armies were using gunpowder. Mann himself sets out a similar perspective to mine:

> the authoritarian state was no longer the private property of a monarchy and old regime, unconnected to the bourgeoisie (as in liberal theory). Nor was it merely the product of their joint interest in repressing labour (as in Marxism). It was the unintended consequence of solutions to entwined class and national struggles (2012, p. 310).

In general, the Bismarck case suggests how important it is for a Marxist theory of international relations to account for the politics of imperialism. The lack of such a perspective is the main limitation of Poulantzas' work, and as Fred Block argued, "state power is still conceived as entirely a product of class relations" (Block, 1980, p. 229), or as Poulantzas puts it, the state is the "condensation of class relations" (ibid.). In conclusion, while Poulantzas stretches Marxism beyond the work of orthodox thinkers, a theory of imperialism based on "relative autonomy" certainly does not overcome Lenin's problems with economic reductionism, and in fact looks less powerful from a geopolitical perspective.

2.3. Marxism and the international: from Political Marxism to the new imperialism

In general, Nicos Poulantzas fails to explain inter-state competition and war or the reasons for the different roles taken in the world order by states and their different degrees of assertiveness. Fred Block also highlighted how the reasons that political elites remain reined in by the bourgeoisie are unexplained by Poulantzas' theory:

> if the argument is that there are structural limits on the degree of state autonomy, then it should be possible to identify concrete structural mechanisms that prevent the state from exceeding its normal authority (1980, p. 228).

One reason that state managers may have to break free of the influence of capitalist lobbies is that they perform within an international system of states, something which Poulantzas' account fails to grasp, but which Political Marxists pay particular attention to. Benno Teschke and Hanne Lacher, who like Kautsky, Hardt and Negri can be included in the group of hyperglobalists, challenge Lenin's argument that rival imperialist blocks of states and monopolies were organized along national lines:

> [W]hy was/is the capitalist state a national state? Why did capitalist class relations and accumulation strategies find expression in a territorial political framework to begin with? (Teschke and Lacher, 2007, p. 567; see also Callinicos, 2009, p. 70).[28]

Teschke and Lacher's argument is based on the fact that capitalism arose following the consolidation of nation-states, meaning that the former could not be held responsible for rivalries between the latter:

> it is perfectly possible to imagine that had capitalism emerged within an imperial formation – let us say, the Roman Empire – it would not have required its political break-up into multiple territorial units. Capitalism did not develop out the system of territorial states that fragments capitalist world society; inversely, capitalism is structured by an international system because it was born in the context of a pre-existing system of territorial states (2007; p. 574).

[28] For a critique of Political Marxism see Callinicos (1990) and Anievas and Nisancioglu (2014).

Essentially, they are arguing that inter-state war predates capitalism and furthermore that, as Ellen Meksin Wood maintained, war is "self-defeating" from an economic viewpoint (2003 pp. 156-7).However, it is useful to stress once again that while not all individual businesses may find war in their interest, being tied to a geopolitically strong state could offer benefits to businesses in the long-term. Furthermore, while capitalism benefits from political stability, its competitive pressure constrains states to master capitalism and fight for a privileged position in the international economy. This is why, although it is logical that China would harm its interests if it were to occupy the South China Sea, or similarly if the USA promoted a blockade it would harm its own or Japan's interests (Dannreuther, 2003, p. 207), this does not guarantee that conflict will not happen – see the section in Chapter 5 on the Trans-Pacific Partnership.

In addition, Teschke and Lacher's *reductio ad absurdum* of history – which poses a fascinating scholarly exercise that cannot be dealt with here (Teschke, 2003) – is undermined by current events. Firstly, this argument is historically flawed because it ignores the role of bourgeois interests in the construction of national states. Secondly, so far globalization has failed to develop a global order which extends beyond national states and national capitalism. Even in the two decades preceding the crisis of 2007-8, when globalization reached its apex a transnational institutional superstructure of governance was unable to substitute the state. In contrast, the more that globalization succeeded around the world, the more states there were which attempted to question the US-led global order – such as the BRICS– and the greater was the number of local challenges to global capitalism which increased capitalists' need for political support. Thirdly, the economic crisis inside the European Union – which remains the most important project in history aimed at integrating national polities under a giant federal state – has clearly accelerated the threat of political and economic fragmentation. Furthermore, the diplomatic action of the German government has served as a 'spatial-fix', which was crucial for both German and international capitalism. Fourthly, Teschke and Lacher's view is very Eurocentric because it overlooks developments in the United States and the Asia-Pacific region. In the USA the rise of capitalist and the state happens in parallel. Meanwhile, Giovanni Arrighi's work shows that the Asia-Pacific region enjoyed a "five hundred years peace", interrupted by sporadic clashes, hosting a geopolitical order which was alien to systemic tensions, in contrast to what

was happening in the Old Continent. How would Political Marxism account for the geopolitical tensions that have characterized this region in recent years?

While the Political Marxist view takes an approach which cannot be adopted in this dissertation, the reader will remember that the classical Marxist theory of imperialism was also limited, although for the opposite reason. In fact, its economic reductionism is insufficient to explain inter-imperial rivalries. It would be unrealistic to imagine a coalition of big banks and multinational corporations manoeuvring the political machine with regard to every US military intervention or untraceable activity of the military elites and secret services involved in proxy wars and popular uprisings. As Anthony Brewer explained, in the complex environment of international relations, "support for the existing order does not imply unthinking conservatism. On the contrary, it requires constant adaptation to changing circumstances […]" (1990, p. 15). This constant adaptation can be too fine-grained and can happen too quickly to allow capitalist lobbies to intervene in planning for a political or military solution, as Kemp recalled with regard to Lenin's times:

> in the cabinet room, as well as in the field, decisions had finally to be made by politicians, proconsuls and military chiefs who had no direct contact or necessary sympathy with the monopoly capitalists, the magnates of heavy industry and the bankers and stock-jobbers who personified the new forces of capitalism (1972, p. 24).

Furthermore, businesses may not be in the mood for military hostilities, as Eric Hobsbawm revealed about WWI (1987, pp. 315-6). However, what could not be denied at the time, nor today, is the "tacit equation of unlimited economic growth and political power" which almost becomes a matter of survival within capitalism (1987, p. 318). The relationship between capitalism and nation-state rivalries therefore stems from the fact that if state managers want to acquire the capability to defend their enterprises, they can only do so by increasing their state's political power, which in turn is tied to the success of the enterprises themselves. In contrast to realism, the politician's interest in consolidating the power and success of his or her state remains entangled in the "expand-or-perish" logic of capitalism. While within the domestic boundaries of a state reforms can maintain or recreate the condition of profitability for capitalism, if an issue involves foreign trade this will require political leverage. So, in

order to protect capitalist interests, security concerns and geopolitical calculations are part of foreign policy, sometimes the most important part.[29] This becomes a vicious circle, in which a strong state can better support its capital, which becomes competitive and can thus guarantee the state solid growth and therefore the economic resources essential for projecting geopolitical influence and defending capitalist interests. Howard J. Wiarda states that while the influence of business lobbying on the American government is well known, the importance of state planning for capitalists cannot be ignored, nor can the benefits a government receives when American enterprises are successful (2009, p. 132). This echoes what Joseph S. Nye called the "unintended direct role" taken by multinational corporations as "instruments of influence" for governments (1974, pp. 157-9).

Returning to the problem of economic reductionism, all this shows that there is not always a direct, explicit economic interest behind a military operation. While this suggests that the orthodox interpretation of Marxism is a lame duck when it comes to international relations, it confirms that Lenin's theory of imperialism remains a solid theoretical platform from which to start developing a more comprehensive geopolitical theory of imperialism, without betraying Marxism's theoretical basis. Unfortunately, this is not an easy task because Marxism does not theorize factors such as war-minded leaders, nor does it conceive the independence of politics (Kemp, 1972 p. 17). David Harvey has attempted to strengthen the analysis of the politics of imperialism in his theory of capitalist imperialism by arguing that "imperialism of the capitalist sort arises out of a dialectical relation between territorial and capitalist logics of power (2003, p. 183).[30] The problem with Harvey's work is the lack of a solid connection between the two logics and a theorization of his "logic of territory". My position is that the interaction between the "two logics" is more complex than Harvey admits. In fact, capitalism has subsumed the state as politicians have grown up in capitalist social environments and have developed a material and intellectual affinity with capitalism.
This means that the "logic of territory" cannot be considered to be a pure manifestation of power, but must incorporate the kind of intersections I have dealt with so far – for instance, when I argued that maximization of state power always

[29] Bryan Mabee makes a similar distinction between the domestic and the international with regard to the United States (2013, pp. 112-3).
[30] For a symposium on Harvey's *The New Imperialism* see Sam Ashman (2006).

happens within a capitalist framework. For the same reasons, Teschke and Lacher are wrong to reduce state power to a legacy of the absolutist era. In fact, although I have highlighted Miliband's limitations, the British thinker's argument about the occupation of the state by capitalist elites cannot be overlooked, for as Chris Harman points out, "[the] leading personnel of the state went to the same schools as the leading capitalists, go to the same clubs, and are intermarried with each other […]" (1990). While I am not suddenly endorsing economic reductionism, I accept that social ties of this kind make it almost impossible for state managers to adhere to or even be willing to shift to any kind of anti-capitalist strategy. The process of bourgeoisification remains very deeply rooted even in the alternative left, to the extent that politicians are often almost unconsciously capitalist-minded.[31]

This is to make the point that in most cases Harvey's "logic of territory" cannot be seen as external to capitalism. Others agree with this argument, and for Michael Mann "states are also impure, being economic as well as political. They own properties, they spend, and they tax" (2012, p. 30). Similarly, James Anderson noted that

> to counter pose a "territorial" with a "capitalist" logic implies that the former is non-capitalist (perhaps even "pre-capitalist" though Harvey does not say so). But how could the main motivations of state managers and strategies not be "capitalist" given the inevitably capitalist nature of "the state in capitalist society"? (2005, p. 11).

Pointing out that the state is not homogeneous is crucial, because otherwise, in attempting to escape instrumentalism one risks hitting the opposite side, that of Kautsky, Teschke and Lacher. Once again this confirms what was stated above: the maximization of political power is tied to technological and economic competitiveness and must be coordinated with a collective strategy for the maximization of economic power. This might be what Gonzalo Pozo-Martin meant when referring to the necessity of considering a "capitalist geopolitical logic" (2006, p. 556). As Bismarck understood, in the current world there can be no geopolitical power outside capitalism. In fairness, this is also what Harvey hints at when he describes imperial logic as the mobilization of "resources towards political, economic, and military ends" (2003, p.

[31] An example of such profound intellectual bourgeoisification is the commemoration of Steve Jobs' death by the Rome branch of an Italian left wing party.

26). But it may be more semantically correct to follow the presentation of the argument adopted by Alex Callinicos: “to understand capitalist imperialism as the intersection of economic and geopolitical competition” (2009, p. 72) rather than theorizing two different logics. The million-dollar question is where this intersection happens. In an increasingly interconnected economy, the state is compelled to take action for various reasons.

Pressed by Teschke and Lacher, Alex Callinicos has refined his original argument, explaining that the framework provided by Marxism allows new levels of complexity to be incorporated into the theory, as capitalism provides the overarching backdrop against which politics takes shape. Taking insipation from Marx’s insight on the co-existence of pre-capitalist and capitalist economic forms, Callincos asked

Why shouldn’t the state system be conceived analogously, as a social form that develops prior to the dominance of capitalism but that is incorporated into and adapted to the capitalist mode? (2009, p. 80)

This conclusion has the virtue of opening the debate on imperialism to different national peculiarities, such as institutional organization, history, identity and geographical location, with the advantage of keeping the discussion anchored in a materialist perspective, as opposed to the too abstract ‘logic of territory’. Given the high diversity that characterizes a world order inhabited by liberal, social-democratic, communist, post-communist and post-colonial polities, a Marxist theory of imperialism must offer more tools with regard to social, political, economic and cultural forms which were not born directly out of capitalism, but which were swept away by capitalism before they returned, transformed or socially and spatially enlarged. Similarly, for the Weberian scholar Linda Weiss, globalization can “complement and coexist” with the nation-state rather than disempowering it” (2000, p. 7). Establishing what the relation of power is between political institutions and local and transnational capitalist forces allows it to be understood what kind of strategies foreign policy-makers are more likely to adopt and why. The hypothesis I endorse here is that a condition of reciprocity exists between state and private domains whichemerges within the broad institutional, ideological, and social variables that capitalism has either subsumed or adapted to and whose products vary across time. Books such as *National Diversity and Global Capitalism* (Berger and Dore, 1996) and

Varieties of Capitalism (Hall and Soskice, 2001) fulfil the task of illustrating the consequence of this diversity, although they now need to be updated to take account of the rise of a world order in which Asian countries have developed political and economic power.

This allows both moments when political power prevails over economic power and moments when the reverse is true to be accounted for. For this reason, I believe that the argument made above by Callinicos and the points I have raised on the impurity of Harvey's "logic of territory" are open to taking Chris Harman's view of state-capital reciprocity as the starting point for a theory of imperialism. In the following passage, Harman describes what he calls "structural interdependence".

> [C]apitals have never developed according to the anti-statist schemas of classical economics. They have influenced and been influenced by the state structures in which they have found themselves […]The state and the individual capitals are intertwined, with each feeding off the other (1991).

What is most interesting is not only the flexibility inherent in Harman's perspective, but also the fact that put in these terms one can also carve out a role for the state in allegedly neoliberal societies. What emerges from the recent literature is that in the end the state is a proactive actor. This is less about the idea of an interventionist state as seen in socialist experiences – although this will have to be taken into account with regard to China, for instance – but rather is more about the Keynesian idea of a state which develops and maintains the technological-infrastructural conditions necessary for capitalism to prosper. Marianna Mazzucato (2013) endorses the narrative of what she defines as "the entrepreneurial state" to challenge the mainstream ideology which feeds the current austerity policies in Europe and debunks the myth of individual entrepreneurialism as the key to success. She describes as naïve the idea that the many start-ups operating from Silicon Valley which then became world leaders in the technology sector – such as Apple – were created in a "garage"by a few young ingenious minds like Steve Jobs. Instead, she argues that it was the state that provided the fundamental know-how necessary for these young businesses to succeed, often through military-scientific research, as in with the case of Internet and the Advanced Research Projects Agency NETwork (ARPANET). Interesting contributions along these lines have also come from Stuart Leslie's work on the importance of the military

developing Silicon Valley (2000) and Fred Block's publications on the invisible hand of government (2011).

What this literature asserts is that the structural, coordinated and long-term construction of factors and strategies of production would not be possible without the political and scientific skills that a state can provide. During a Historical Material conference, some have criticized Harman's "structural interdependence" for being too simplistic. My answer is that Harman's argument allows the kind of flexibility that is required in a multipolar and pluri-ideological international system. A Marxist theory of imperialism should attempt to bring this perspective into its portrait of international politics, but how should this "structural interdependence" be theorized? That would depend on certain peculiar features of each state which would contribute to shifting the relations of power between governments and private capital in favour of one or the other. Realistically, a Marxist theory of imperialism could explore three interconnected dimensions, one of which will be object of discussion in Chapter 3.

Firstly, an observation of the *historical-institutional* development of a country is essential to explain the domestic distribution of power together with its geopolitical priorities. This could be done through the Uneven and Combined Development literature which deals with contemporary Russian, Chinese and Indian imperialism and would require the updating or complementing of existing works with an eye to foreign policy. Secondly, the *international hierarchy* discourse may also be beneficial to a Marxist theory of imperialism. This entails understanding what the most solid political and economic alliances established by a state and its ruling class are, as they can produce a path dependency effect on political decisions over a certain period of time. While Alexander Cooley's application of business models to the international structure appears too rigid to suit my purpose (2005, p. 5; Lake, 2007, p. 56), work such as that of David Lake maybe valuable. Welcoming hierarchy into a Marxist theory of imperialism is far from profanity. Not only is it a rejection of the realist idea that the world order is anarchic, because hierarchy entails the condition of order and is essential for capitalism (Hobson and Sharman, 2005, p. 71; Lake, 2007, p. 48), but there is also a close relationship between hierarchy and uneven geographical development. The latter can change the hierarchical organization at the international level, determining the rise and fall of states, and at the domestic level by favouring booms and crises and producing ideological shifts among political elites. Thirdly, a

study of the *identities, worldviews and strategic cultures* of political elites could provide the analytical instruments necessary for Marxism to engage with political theories of the international. This would permit the various approaches of state managers to the economic and political obstacles faced by both their states and private companies to be known. Given that strategic cultures are fed by the historical, geographical and cultural bases of states, exploring the values of territory beyond its direct economic benefits is a viable theoretical way of constructing a more solid Marxist theory of imperialism

Conclusion

This chapter has attempted to shed some light on the vexed issue of relations between political elites and the bourgeoisie. The importance of this question arises from the lack of a systematic analysis of the state in Marx's work and was the cause of many of debates in the 20th century. Scholars have periodically put forward various theories of state-capital relations, but in this chapter I have focused only on those contributions most relevant to a discussion of imperialism. I have attempted to tackle this problem by starting a fresh from the classical Marxist theory of imperialism, in which interactions between governments and big business was central to explaining the causes of violence in international politics.

Going through some of the key contributions from the early 20th century, I concluded that elements such as the influence of monopolies on governments and the alliance between governments and monopolies aimed at pursuing resources and markets should remain central to any theory of capitalist imperialism. This insight is still relevant today, as is Hobson's, Lenin's and Bukharin's point about political and military competition between different national blocks. In addition, I have argued against critical scholars that the value of Lenin's theory lies particularly in the political implications of the economic organization of states. What transpires from both Lenin and Bukharin is that international competition between businesses reaches a point where they hand over to states the task of imposing a favourable order, or of providing access to resources and markets. Furthermore, I believe that while analysis of capitalism must remain central to a theory of imperialism, Lenin's and Bukharin's arguments about the supremacy of political power over private business when geopolitical challenges present themselves needs to be expanded and refined. This is what I have attempted to do in engaging with Poulantzas and then in dealing with the debate on Marxism and the international. Poulantzas'explanation of the autonomy of the state provided a picture of governments being chained to the interests of the bourgeoisie. In addition, I highlighted the weakness of Poulantzas' account in a world fragmented into many nation-states.

In engaging with some issues dealt with by the 21st century debate on capitalist imperialism, I have focused mainly on criticizing Political Marxism for ignoring the relation between capitalism and war, although I have also argued that David Harvey's

theory could be improved by further integrating his two logics – the 'logic of capital' and the 'logic of territory'. In fact, in the last part of the chapter I attempted to endorse three interconnected ideas about the politics of imperialism in capitalist states. First, state and national capital are tied to one destiny, and the success or failure of one will determine the fate the other, meaning that big business needs strong political power to compete in the international arena. Second, different political elites will make a synthesis of the various geopolitical, economic and social pressures they face, not according to the narrow-minded logic of bank managers, but according to their ideological worldviews and interpretations of the obstacles they face. Third, the level of competition in the international system that capitalism requires will set geopolitical challenges for state managers, the speed or magnitude of which will require a political and military collective brain which is not always capable of or interested in looking at particular economic interests – above all if the benefits of a military operation are projected to be long-term or if it will improve the stability of the regional or world order in its totality.

In general, the balance of power between political and economic elites remains complex and cannot be theorized in much detail without knowledge of the specific circumstances of a case-study. This chapter has shown that this balance is determined by the intersection of global economic and geopolitical forces during a specific capitalist phase and the reaction of each national group of political elites, their national economies and citizens. Therefore, I concluded by endorsing Harman's "structural interdependence" between state and capital, although I agreed that this is a broad framework within which many different kinds of intra-elite relations are possible, depending on the historical-institutional background of a state, its position in the hierarchy of the international system and the strategic culture of its elites. The next step should thus be to conceptualize the ideological and geostrategic character of imperialism in a Marxist framework. Given that ideologies often develop through the intersection of material and cultural elements, and that these in turn stem from history and geography, I believe that it is possible to construct a framework which allows Marxism to incorporate political ideologies which can help focus on the national peculiarities that characterize imperialism in a world which is both integrated and diverse. Ultimately, what the next chapter does is to attempt incorporating within a

Marxist framework an analysis of the tension between economic and political logics of power at the level of agencies.

Chapter 3

The idiosyncratic: capitalism, territory, ideologies

Introduction

Chapter 1 described the global, structural economic constraints to states' strategies. That discussion – in addition to some parts of Chapter 2 – focused on the economy of imperialism. Instead, this chapter explores the possibility that a Marxist theory of geopolitics can incorporate a nationally-informed politics of imperialism. Marxism can provide such a framework by looking at the relation between expansionary ideologies and materialist values of territory, where by materialist I not only mean historical materialism but also refer to a broader conception which entails a political valorisation of territory. The chapter does not question that concepts explored in chapters 1 and 2 should have primacy in a Marxist analysis. However, it reasserts the idea that, within a chaotic and complex capitalist global order, different state managers adopt different strategies. These strategies are informed by their worldviews and seek a viable balance between economic and geopolitical interests.

By examining the ideologies of elites, this chapter helps Marxism to carve out a respectable space in the non-Marxist fields of geopolitics and foreign policy. In fact, Marxism is generally neglected by those who adhere to classical approaches to international security. It was with incredible surprise that I found a short chapter dedicated to historical materialism in Alan Collins' *Contemporary Security Studies* (Herring, 2013, pp. 42-53), which showed that Marxism offers a global perspective on the social sciences that can be applied to various issues falling within the boundaries of security studies. However, the chapter did not offer the possibility for Marxism to have a say about inter-state conflicts, and it considered the theory a useful approach to explain other kinds of security challenges which may be of greater interest to students of economic development.

The chapter does not claim to have found in Marx's work a theory that explains the role of ideologies in imperialism. Instead, what follows is an attempt to use aspects of Marx's work to build a theory of imperialist ideologies. It is concluded that this is possible if one explores the relation between nature, ideology and capitalism. Before exploring this, the chapter highlights insights from Lefebvre's work which have been overlooked by Marxist geographers and which allow to think about the need for Marxism to come to terms with the political spatiality of mainstream theories of

International Relations (**3.1**).
The main argument of this chapter is also preceded by a survey of strengths and weaknesses in Charles Wright Mills work (**3.2**). This is particularly important in the context of this thesis, because of Mills' study of the interaction between economic and political interests.
The chapter then puts forward two arguments drawing on Marx's work. These arguments are independent of each other but at the same time they reinforce one another and should be considered part of a comprehensive discourse (**3.3**). The first of these relates to how humans' interaction with nature mattered to Marx and how this does not necessarily undermine his theory of historical materialism. It is explained that if capitalism has developed unevenly along geographical and institutional lines, its unevenness should also be conceived on an ideological level. If there is ideological unevenness, state managers' worldviews will not be completely subsumed by the logic of capital.
While nations remain – also – social constructs, national strategic cultures are an example of an ideological space which does not always overlap with the geoeconomic interests of global and even national capitalism.
Secondly, the chapter completes the core argument by stressing that there is a strong relation between capitalist economic valorisation of space the strategic and symbolic valorisation of the same. Because capitalism accelerates the intensity through which humans interact with nature, it makes humans more dependent on the latter. The consequence of this intimate interaction between humans and nature is an increase in the economic value of nature to the point where military and symbolic concerns might develop even more strongly than economic value themselves. Politicians therefore, happen to take crucial decisions in international relations which cannot be directly driven by the interests of capitalist lobbies. They mediate pressures accordingly to their ideological valorisation of territory and in general accordingly to their strategic cultures – among other factors not considered.

The tension between capitalist and territorial logics of power is declined to the less abstract study of US grand strategy in section **3.4**. In particular, the chapter offers an argument on the structural contradiction of US grand strategy which is very important to grasp the empirical essence of some theoretical statements made in this thesis. Furthermore, this section provides the reader with a lens through which the case-study

can be observed. This contradiction is condensed in the concept of *Wilsonianism-cum-primacy*. The latter refers to US grand strategy's (impossible) objective of maintaining global geoeconomic openness along with national geopolitical primacy. The remainder of the chapter will present a methodological statement (**3.5**).

3.1. A new theoretical brick in third-wave theories of imperialism

There have been two main ways of looking at space in International Relations theory. For realists, the world is divided into many sovereign and fixed territorialities, and so it follows that international politics is the product of units of power enclosed within fixed boundaries. This is a form of spatiality built on two theoretical assumptions, two of which are very important for this discussion. The first is that state territory and society represent a homogeneous container (Agnew, 2003, p. 53), while the second assumes a divide between domestic and international politics, with the latter having primacy over the former (ibid.). Two elements of the classical geopolitics view of space are similar to realism. Like Hobbes it considered the state as constrained by the logic of survival, and similarly to Morgenthau – who theorized the anthropologization of the state – it maintained that the foreign policy of states could be explained "by direct analogy with the plant and animal world" (Bassin 1987, 477). As Mark Bassin explained, the state corresponds

> to a natural organism, from which point it was immediately possible to derive the imperative for the growth, i.e., physical expansion […] the international arena was thereby converted into a network or, to follow the popular image, a jungle of competing state organisms, struggling against each other for their bare survival (ibid., 476-7; also in Bassin 1996, p. 323).

While for realists "social and political organizations are defined in terms of this or that state" (Agnew, 2003, p. 98), in classical geopolitics the argument is slightly more articulated. In fact, the mere idea that territory, nature and race are so important (Agnew, p. 93) makes the fixed space of realism partly inadequate for classical

geopolitics. However an interesting compromise between these positions might be the one of Lucian Ashworth, who argues that in the realist tradition there are two ways of interpreting the idea that "human behaviour is the result of laws of history that are rooted in the natural world. For Morgenthau and Herz that natural source was unchanging human nature. For Mackinder and realist strategic studies it was the natural environment" (2011, p. 294). While Marxism could never incorporate Morgenthau's "ahistorical and aspatial homo politicus", I it could dialogue on some aspects with 'realist strategic studies', a tradition brought forward during the 20th century by Spykman which "depended on the influence of the natural environment that can be changed by human land use and technology" (Ashworth, 2011, p. 294). For the sake of discussion however, while one could get away with applying realism and classical geopolitics interchangeably, there is often an important difference between the two approaches which is determined by the concept of *Lebensphilosophie* – the continuous tension between the finite and the infinite that existed in the romantic spirit of the 19th century (Ruggiano, 1981). This difference between realism and classical geopolitics is important in developing some thoughts on the politics of imperialism, means that a nuance which David Harvey overlooked in his argument about the "logic of territory" must be highlighted.

What classical geopolitics considers being a tension between the finite and the infinite can be interpreted as a tension between the fixed borders of states and the less defined, mobile borderland of nations, often determined by the intersection of physical, historical and ideological elements. This means that the state is not as fixed as David Harvey conceives it, but is "relatively fixed". States are likely to act in a manner influenced by their "relative fixity" in the process of advancing the territorial reach of state power through the extension of national boundaries. For instance, Russian imperialism usually acts over the post-Soviet space, while China does not claim territories in South America or Africa – where it acts through the diplomacy of money. Even the US, which officially does not have territorial claims, underpins its imperialism with political rhetoric attached to US national values and myths. In classical geopolitics, this aspect is partly incoherent, because while states pursue the conquest of their own living space, Ratzel envisioned entities which would surpass national boundaries and aim to become continent-sized empires. In fact, Ratzel's narration was partially at odds with the idea of "blood and soil", which was central to

Nazi propaganda. In Germany, as Bassin himself writes, the geopolitical discourse did not follow *tout court* that of Ratzel, instead it was driven – initially – by the will to gather together the German populations living outside Germany in one nation-state (1987, p. 475). Ultimately, this further confirms the problem of the relation between state borders and national boundaries, which both feed nationalist thinking and offer alibis to elites.

This is not my invention. Others have argued that the idea of nation is problematic because is contained behind a rough frontier. While a nation is embodied in its territory, it is also disembodied because of the mobility of a people. In his study of globalization, Dicken acknowledged that "whereas a state has a recognized and defined territory, a nation may not", while there is a "tension between the triad of nation, state and nationalism" (Dicken, 2011, p. 172). As one writer put it, "difference and limits are essential", since "where difference is lacking, violence threatens" (Girard, 1972, p. 87, quoted in Raffestin, 1986, p. 3)". This could be the case in Europe, where many citizens live outside the state representing the main features of their identity, or where many foreigners inhabit countries to which they have migrated. In addition, a nation can be disembodied from its state in a more subtle but powerful way, when elites and people develop ideological claims which encompass a space that extends beyond the state's borders, a case reflected in the experience of the United States' exceptionalism.

Taking these factors into account could make a Marxist theory of imperialism more interesting because it would add complexity to an already rich theory of the production of global economic space. However, Marxists usually have an aversion to such claims because, as I discussed at the beginning of Chapter 1, they consider space to be socially produced and not a living natural entity. In fact, while classical geopolitics sees the world through Malthusian lenses (Bassin, 1987, p. 478), a Marxist account of space considers scarcity and conflict as created by logics of profit. Nikolai Bukharin's comment in this respect is very useful for understanding why it is such an arduous enterprise to attempt to join together in the same analysis of imperialism the concept of space inherent in Marxist geography and the view of 19th century geopolitics. Bukharin rejected classical geopolitics' view of space, because it was limited by its "geographical naturalism". These approaches, he stated, fetishized territory and became "childish prattle" once Marx's historical materialism was born. Following

Marx's method, in Bukharin's opinion territory mediated politics but not directly. Put simply, "politics does not grow out of the 'land' at all, but first and foremost from economic relations" (Bukharin, 1936, p. 564). This was coherent with what was discussed in Chapter 1, and in fact Lefebvre also stressed that space cannot be conceived in isolation from capitalism.

> The means of production, themselves a product, cannot be separated from the forces of production, techniques, and knowledge; from the international division of social labour; from nature; or from the state and other superstructures (2009, 188).

This reflects the holistic Marxist view of society and is also reminiscent of the primacy of the socio-economic base over political superstructures. However – as the first paragraph of Chapter 1 anticipated – if this is the core of the discourse which was developed during the 20th century by Marxist geographers, scholars overlooked how Lefebvre went beyond an economy-driven production of space and offered a theoretical bridge to a political perspective of space which is closer to the prevailing view in IR and that can be useful here. Lefevbre clearly maintained that the state "serves as a tool of thought and of action […] a means of control, and hence of domination, of power" (1991, p. 26). In another passage he was even more explicit, stating that

> [t]he State and territory ... [are] mutually constitutive. This explains the deceptive activities and image of state officials [hommes de l'Etat]. They seem to administer, to manage, and to organize a natural space (Lefebvre, 2009, p. 228).

In a capitalist society this power is used to reproduce the existing relations of production, but it cannot be overlooked that it is up to the state's political representatives to decide which tactics of "control" and strategies of "domination" are the most effective to achieve individual and collective political "power". Likewise, it is plausible to believe that these calculations depend on personal interests, the strategic balance in political parties, ideological discourses and interpretations of history and perceptions of direct security threats or threats to strategic economic interests. But if one looks at the history of the world of nation-states, it can be seen that Lefebvre's description of a state that is "mutually constitutive" with its territory is not precise,

because it lacks the nuance observed above with regard to the existing discrepancy between official state borders and ethno-cultural territories. Still, Lefebvre agreed that the geographical concerns, historical memories and symbolic values attached to a territory should be taken into account (Lefebvre, 2009, pp. 224-5). In this sense he provided one more insight into the importance of the geography of a territory which remains open to different interpretations but which certainly shows how he ultimately did not overlook the implications of some of the elements I am attempting to place in a more coherent discourse:

> The understanding of space cannot reduce the lived to the conceived, nor the body to a geometric or optical abstraction. On the contrary: this understanding must begin with the lived and the body, that is, from a space occupied by an organic, living, and thinking being. This being has (is) its space, circumscribed in its immediate surroundings, but threatened or favoured by that which is distant (Lefebvre, 2009, p. 229).

As the Marxist editors of one of Lefebvre's works had to acknowledge, the French philosopher went beyond the idea of space which appealed to Marxists. They admitted that space is produced "just as crucially, as he now stresses, through the variegated regulatory strategies of the state mode of production" (p. 223). Geostrategic concerns do therefore affect the action of political elites, in addition to national culture, something which emerges in many passages in Lefebvre's essay. However, one passage in particular confers a high degree of importance on the politics of space. Paraphrasing a mainstream definition of the state, Lefebvre claims that without space there is no state: "born in and with a space, the state may also perish with it" (p. 224). This affirmation is crucially important to the argument in this chapter, above all relating to what Chapter 2 said about the autonomy of state managers from the capitalist ruling class. In terms that will make more sense to those who have read Chapter 2, Lefebvre admits that foreign policy, diplomacy, military policy and strategic economic agreements can be understood as strategies of political elites aimed at the political and economic success of the state they represent. Ultimately, Lefebvre's point of view is important for the debate in general and for this thesis in particular because he seemed to allow in different words what Callinicos stated about Marx's method of incorporating new levels of complexity within capitalism (2009,pp. 80, 81-2). While this political power ultimately favours the

reproduction of capitalism, for Lefebvre it depends on the political representatives of the state deciding what strategies to pursue. Foreign policy actions, Lefebvre would have agreed, must depend on geographical concerns, economic factors and historical-symbolic values attached to a territory, because the state is simultaneously a '*natural territory*', a '*social space*' and a '*mental space*' (italics in original; Lefebvre, 2009, pp. 224-5). This point about the three dimensions of power spatiality has a tremendous potential for Marxism to deal with certain political matters as classical geopolitics, strategic realism and constructivism do.

By acknowledging that elites' strategies are crucial for the survival of the state in a capitalist world order, Lefebvre also allowed for the idea that security can be at odds with private and also national economic interests *vis-à-vis* a major threat. This also serves to question Neil Smith's argument that "with the development of the productive forces under capitalism, the logic behind geographic location retreats more and more from such natural considerations" because distance is "overcome" thanks to transport and because raw materials need more refinement (Smith, 1990, pp. 103-4). Instead, I want to put forward the idea that Smith's orthodox view does not always give a complete picture. While human beings have learned how to master nature, geographical features can either smooth or exacerbate economic operations and can have a positive or negative effect on states, to the extent that strategic calculations are required to adjust to the opportunities and challenges that arise. Thus, the truthfulness of Smith's argument against Halford Mackinder's idea that "*the uneven distribution of fertility and strategic opportunity upon the face of our Globe" determines foreign policy must not be taken for granted with regard to every scenario (1942, pp. 1-2).*[32]In addition, Smith's argument runs the risk – one that often comes with Marxism – of not valorising the high degree of diversity in life and society. It is worth attempting to incorporate the political value of territory in a Marxist theory of imperialism. For Daniel Dzurek, for instance, territory has both tangible properties, which relate to populations and resources, and "intangible factors", which may be "historic animosity", "cultural differences" or "third-party involvement" (2005, p. 263). Paul R.

[32]England and the later United Kingdom are a perfect example of a great power which was small and with few resources, lacking some of the characteristics considered necessary by Mackinder. But this is not the whole truth; in fact, Britain's rise as a world power was aided by easy access to coal, which also helped Europe to overtake China (Jacques, 2009, p. 26). In addition, colonial occupation and military violence were central to British world hegemony.

Hensel and Sara McLaughlin Mitchell are more specific in defining the meaning of tangible and intangible, with tangible meaning "control over a particular territory, the protection of an ethnic minority, or the removal of a particular leader" and control of a "strategic territory that offers control of trade or communications routes or that could improve a state's military position relative to its rivals, as well as territory that contains valuable resources" (2005, p. 275), while intangible means, among other things, "influence, prestige, or ideology" (ibid.). Establishing which of these values fits in the picture will depend on each case. This begs the question of how to theorize in a Marxist theory of imperialism that value of territory which avoids being explicable only by looking at profit-driven logics and the exploitation of resources, labour and markets.

This should lead to the conclusion that territory embeds several values, which are either material imperatives or properties of territory and which I have attempted to provide an account of in these three theoretical chapters.[33] The link between these values has to be searched for in the realm of security – state violence – which is necessary to capitalism in order to valorise the material assets of territory and to a nation and its population and politicians in order to defend those symbolic assets which are believed to be the ideological pillars of their society, although of course they are often constructed by elites.

However, the question that must be posed here is how and to what extent Marxism can appreciate some of the insights mentioned so far in this chapter without overstretching the theory. Should Marxism incorporate some elements of realism or of classical geopolitics? How can Marxism be stretched into a theory of the politics of imperialism by adopting Lefebvre's interesting but undeveloped political observations? The argument put forward in what follows does not maintain that Marxism can be fused with realism or classical geopolitics. Rather, this chapter advances the idea that there are underexploited concepts within Marxism that can be presented in a way that permits discussion of the politics of imperialism. I will not argue that Marxism can be developed into a theory of imperialism that embeds all that is political, but rather that Marxism could incorporate the study of ideologies of imperialism, and in particular of

[33]For a recent work on the value of territory and inter-imperialist rivalries see Colás and Pozo-Martin (2011), whose approach, however, still sees the politics of imperialism as determined by the logic of capital.

strategic cultures. If one takes into account, broadly speaking, a definition of strategic culture, it is possible to understand why Marxism can find some space for an argument. In a way that is interesting for my purpose, Kerry Longhurst says that strategic culture is "held by a collective and aris[es] gradually over time through a unique protracted historical process". Furthermore, "strategic culture is persistent over time, tending to outlast the era of its inception, although it is not a permanent or static feature" (2004, p. 17). This description is useful to me first because it refers to strategic culture as a "historical process" and therefore allows its intersection with the development of capitalism to be seen and secondly because while it fits into a framework where capitalism dominates, at the same time the fact that a strategic culture is rooted in history but can be "persistent over time" and "outlast" the moment of "inception" is favourable to the idea of the spatial unevenness of capitalism.

In particular, given the intense interaction between capitalism and geography, I have decided to use the latter – interchangeably with the concept of space and territory – as a safe bridge between a theory of imperialism centred on the expansionary pressures of capitalism and theories that blame violence on strategy, politics, tradition and symbolic values of territory. Space can provide a ground in which economic and political factors are embedded. Arguing that space contains several values not only allows me to highlight political elements without being disrespectful of the fundamental claims of Marxism, it also maintains a coherent connection with Lefebvre's idea that space is natural, social and mental at the same time (2009, pp. 224-5). In fact, I am not defending the primacy of ideology, but claiming that as this is an ancient feature of human existence it should be taken into account. In *The Land of the Elephant Kings* (2014), Paul J. Kosmin describes how the rulers of the Seleucid Empire constructed a sense of affinity between their people and their lands which spread from the Balkans roughly to modern Syria (Kosmin, 2014, p. 5). In *The Territorial Imperative* (1967), Robert Ardrey argued that territoriality is a human instinct. Concerns about territorial features – hills, rivers, forests etc. – were already present in the diaries of Caesar (Elden, 2013 p. 56). Has all this been swept away by capitalism?

Given the centrality that I give to space, in this chapter I will often use the word "geo-ideology" interchangeably with strategic culture. However, the problem of how to link this view to Marxism remains. This is the knot encountered by some of those who

contributed to the debate on imperialism during the first decade of this century, who suggested that further research on imperialism should focus on how the ideology of state managers processes major pressures stemming from systemic economic trends and the interests of the capitalist ruling class and then translates them into foreign policy. Drawing on Fred Block, David Harvey reasserted the idea that politicians do a different job from that of corporate managers as they have long term and structural concerns (Harvey, 2003; also Block, 1980, p. 230). Furthermore, as was said at the very end of Chapter 1, Harvey focussed his attention on a specific moment of imperialism. He stated that "strategic decisions [...] are arrived at and implemented in the rough and tumble of the political process where variegated interests and opinions clash [...] (2003, p. 28), which seemed of particular importance to explain not only how the belligerent relations between Barack Obama, his advisors and some sections of the administration articulated the policy-making process, but also how the agitated dialectic between Donald Trump, his advisors and some sections of the ruling class and the Deep State makes US foreign policy more fascinating, a problem which is central to the argument put forward in the Afterword. A second suggestion was developed by Alex Callinicos as part of his attempt to articulate the concept of the "realist moment". He maintained that one way to appreciate what he meant is to open Marxism to an understanding of the "main theoretical ideologies of the international […]" (Callinicos, 2009, p. 83). This argument returns in the case-study, which highlights how Obama's and Trump's adherence to different interpretations of American nationalism either influenced their policies or underpinned their discourses on foreign affairs. Gonzalo Pozo-Martin was even more explicitly focused on state managers' strategic cultures as he maintained that knowing the ideologies of imperialism would help to trace which fractions of the capitalist ruling class they represent and find "some kind of systematic relation at the state level between imperialism and foreign policy" (Pozo-Martin, 2006, p. 239; 2007, p. 561). While I do not promise to find this systematic relation, the rest of my work certainly attempts to explain how different policy-makers variously interpret pressures and unfavourable and favourable scenarios and how they translate them into policy according to their understanding of world politics. This will be seen more clearly in the case-study of Obama, but also when looking at how Obama and Trump adopted different strategies to achieve similar objectives.

Before presenting my argument, I want to reject the claim that this account of the value of space is "too geographical and not sufficiently historical" (Agnew 1995, 379). To theorize imperialist ideologies within Marxism does not mean surrendering to the sirens of realism, a critique contained in a much overlooked contribution from Darel E. Paul (2007). While my approach does not exclude the possibility of a dialogue with Gramscian and poststructuralist accounts such as those of critical geopolitics, Marxists and critical thinkers should accept the idea of foreign policy-makers being driven by ideology. Even if nationalism and its derivatives often originate as political inventions, the territorial trap "infuses the thinking of political actors [...]" (Murphy 2010, 770–1), and if the territorial trap is present in state managers' minds, this means that it is real and for this reason it matters to a Marxist theory of imperialism.

3.2.The "interlocking" of economic and political logics in C. W. Mills's work

If this thesis has pursued an objective with pedantic passion, this is to unbind the intricate bundle of economic and political forces that make of foreign policy a brain teaser. What the theoretical framework of this thesis has so far revealed is that the study of US grand strategy has to focus on the interconnection of different levels of analysis and competing interests and views. With a different approach, this "interlocking" is what the elitist thinker Charles Wright Mills sought to understand in his study about the influence that political, economic and military elites have on policy-making. For Mills, the essence of power

> can be understood only when these three sets of structural trends are seen at their point of coincidence: the military capitalism of private corporations exists in a weakened and formal democratic system containing a military order already quite political in outlook and demeanour (2000, p. 276).

Many times this dissertation has stated that it would be reductive to account for the making of American grand strategy only looking at corporate capitalism – like orthodox Marxism. And equally narrow-minded are those approaches that focus exclusively on military power – realism – and political dynamics – as in Foreign Policy Analysis.
However, Mills' thesis does not come across with the necessary clarity and rigour

about the questions that this research has sought to answer. Mills's work seems particularly concerned with the harmony of interests between the three areas of power that he explores, while he overlooked the contradictions that arise between these. The lack of a concern for international relations intended as economic and military competition has played a part in this. Mills foresaw a "coincidence of interest between those who control the major means of production and those who control the newly enlarged means of violence" (2000, p. 276). However, what is at stake in this thesis is not only demonstrating that military power plays a coercive function in favour of capitalist reproduction. This thesis also seeks to understand how economic and geopolitical competition between states is interpreted by foreign policy-makers and what are the competing interests behind different strategies.

For Mills, beyond "economic determinism", there is a "power elite" that fuses economic power with political and military power. That is why the "power elite" is different from a "ruling class" (2000, p. 277). In fact, another problem in Mills's study is that it appears to develop not too differently from Michael Mahan's deconstruction of power in four autonomous spheres (Mann, 2012). For Mills the "power elite"

> it is a coalition of generals in the roles of corporation executives, of politicians masquerading as admirals, of corporation executives acting like politicians, of civil servants who become majors, of vice-admirals who are also the assistants to a cabinet officer, who is himself, by the way, really a member of the managerial elite (2000, p. 278).

This passage reflects very clearly what Mills means by "interlocking". But even more confusingly, however, and in contradiction with a materialist approach, it seems that for Mills in the "power elite" it is the military that have taken the lead of American power. For him, the ruling elite "take[s] its current shape from the decisive entrance into it of the military" (2000, p. 278). The reason why Mills says so, it is spelled at the beginning of his book. "There is", he stated, "a political economy linked, in a thousand ways, with military institutions and decisions" (2000, p. 8). The fact that he does not systematically tackle the meaning of those "thousand ways" it undermines not the intellectual quality but the clarity and structure of his argument. This statement is ambiguous to the extent that it does not reveal whether for Mills it is capitalism to

demand that every solution to crises of profit are pursued and military Keynesianism is just one of those; or whether this is a process dictated by high military personnel whose interest lies in sharing private profits arising thanks to governmental contracts. On the other hand, Mills ambiguity is deriving from the fact that his work is an attempt at bridging the divide between structure and agency. As he explains in a book on the possibility that the rivalry between the Atlantic Pact and the USSR could develop into a third world war,

> war is now a structural feature of the leading societies of the world; it is also the major activity of identifiable men, performed in the name of the leading states of the world and with their means of national power (1959, p. 85).

However, this publication added further ambiguity to his views. He states that "whatever the case in previous periods of capitalism, in our immediate times war in each country is being prepared in order to prevent another country from becoming militarily stronger" (1959, 63). This passage might have a potential if contextualized within a comprehensive discourse. However, it is not clear how this should be interpreted, particularly because Mills defends E. H. Carr's view that "the principal cause of war is war itself", and that war is "so economically irrational" (1959, p. 63). This is stated only to then return to military Keynesianism:

> my point is that slump [...] will further harden the militarist posture of the US elite, and that this has attempted and will attempt to overcome it by still larger military expenditure (1959, p. 66).

In defence of Mills, however, it should be noted that Mills's emphasis on the militarization of policy-making and the economic interests attached to this have to be contextualized historically. The production of armaments between WWII and the early stages of the Cold War, and the threat of total war augmented the influence and prestige of top military bureaucrats and concerns with military power. If anything, the centrality of military elites is another example of how security can become equally if not more important than economic interests.

3.3.Capitalism, nature, and ideology

The key questions of this section are "to what extent non-economic forces influence foreign policy-makers' choices? How can this be theorized?". Marx opposed the idea that human beings' interaction with the geographical environment somehow affected their thoughts in a way that cannot be blamed on capitalism. In *The German Ideology* he highlighted his interest for nature:

> the first fact to be established is the physical organisation of these individuals and their consequent relation to the rest of nature. Of course, *we cannot here go either into the actual physical nature of man, or into the natural conditions in which man finds himself – geological, or hydrographical, climatic and so on*. The writing of history must always set out from these natural bases and their modification in the course of history through the action of men (1974, p. 42; emphasis added).

Marx acknowledged that human beings have initial conditions which depend on both nature and the ways they modify it. Similarly, like nature one might argue that traditions, cultures, myths and anxieties which stem from human-nature relations across history are a starting condition of capitalist development.
In another passage of the same manuscript, Marx stressed with more clarity not only that nature shapes human identities, but also that the influence of nature does not disappear *tout court*:

> Consciousness is at first, of course, merely consciousness concerning the immediate sensuous environment and consciousness of the limited connection with other persons and things outside the individual who is growing self-conscious. *At the same time it is consciousness of nature, which first appears to men as a completely alien, all-powerful and unassailable force, with which men's relations are purely animal and by which they are overawed like beasts; it is thus a purely animal consciousness of nature (natural religion) just because nature is as yet hardly modified historically* [emphasis added] (1974, p. 51).

In *The German Ideology* Marx acknowledged that at a given point there is an animal-like relation between human beings and nature. Unfortunately, statements like the following one have been interpreted as evidence of an economic materialism.

> The social structure and the State are continually evolving out of the life-process of definite individuals […] as they work under definite material limits, presuppositions and conditions independent of their will (1974, pp. 46-47).

To what extent this could be looked through the eyes of a geographical materialism? Norman Geras explained how such a view of materialism was overlooked in the literature (1983; for a more critical perspective see Sayers, 2007). Can materialism also involve nature, with its opportunities, challenges and limits? Surely, both perspectives can co-exist. "Material limits" in fact, it conveys the inherent limits of a particular stage of development of a system of production, but it can also mean the limits imposed by nature and geographical features. This is the *leitmotiv* of the work of John Bellamy Foster, who in *Marx's Ecology* (2000) maintained that a broad and comprehensive interpretation of the concept of historical materialismwas necessary, extending to three different kinds:

> (I) ontological materialism asserting the unilateral dependence of the social on the biological (and more generally the physical) being, and the emergence of the former from the latter;
> (II) epistemological materialism, asserting the independent existence and transfactual [that is, causal and lawlike] activity of at least some objects of scientific thought;
> (III) practical materialism, asserting the constitutive role of human transformative agency in the reproduction and transformation of social forms.
>
> Marx's materialist conception of history focused principally on "practical materialism." "The relations of man to nature" were "practical from the outset, that is, relations established by action." But in his more general materialist conception of nature and science he embraced both "ontological materialism" and "epistemological materialism" (Foster, 2000, p. 2).

The central idea of this part of the chapter is, as Foster maintained, that Marx did not reject "ontological materialism" or the idea of society being dependent on nature,

while also mastering it. The prevalence of one form of materialism does not nullify the other components. Sebastiano Timpanaro, an Italian Marxist who stood out from the Althusserian crowd, stressed that materialism was long considered in a very restrictive and unrealistic way – "vulgar materialism":

> By materialism we understand above all acknowledgement of the priority of nature over "mind", or if you like, of the physical level over the biological level, and of the biological level over the socio-economic and cultural level; both in the sense of chronological priority (the very long time which supervened before life appeared on earth, and between the origin of life and the origin of man), and in the sense of the conditioning which nature *still* exercises on man and will continue to exercise at least for the foreseeable future. (1975, p. 34; see also pp. 40-3, 69).

Timpanaro's words mean that in the interaction between humans and nature – what Marx called metabolism – nature was not to be considered such a passive element in the formation of identities and ideologies. In fact this meant that nature – territory – found space in the way politicians interpreted events. This did not necessarily depend entirely on a base-superstructure kind of relation. John Bellamy Foster complained that Marx's conception of nature was treated from a reductionist perspective, according to which ecology was another shape taken by value (Foster, 2000, p. 10). What I want to restate in this part of the thesis is the idea that geography still acts as a concern to human minds and a constraint to human actions. As Forster put it, "we must understand how spiritual conceptions, including spiritual connections to the earth, are related to our material, earthly conditions" (Foster, 2000, p. 11).

Describing the benefits of and challenges that human beings find in their relation with nature exclusively in terms of the development of new material (economic) needs seems reductionist, and therefore unrealistic. Nature is not the same everywhere, therefore it is likely to offer humans different conditions, which is why one should allow for different degrees of reciprocal interaction between the natural and the social, rather than the univocal relationship described by Smith. This is also the object of Foster's concluding remarks:

> The material exchanges and regulatory action associated with the concept of metabolism encompassed both "nature-imposed conditions" and the capacity of human beings to affect this process (Foster, 1999, p. 381).

If Foster's illustration is to be considered a viable way of approaching the importance of elites' ideologies in foreign policy-making, what is left of the historical materialist approach of Neil Smith? According to Smith, the technological progress of capitalism in transport and the refining of natural materials made the absence or presence of raw materials in one country relatively irrelevant, and thus humans' ability to master their surrounding environment weakened people's attachment to a certain land and their imaginary. Instead of maintaining that capitalism swept away every pre-capitalist phenomenon, it makes sense to admit that the making of a mass-psychology may have recycled certain beliefs and brought them to a national or regional scale, while the speed of the circulation of ideas through capitalism may have effectively spread certain ideologies that otherwise would have remained local or attached to just one specific issue – as Benedict Anderson (1991) argued of vernaculars and national sensibility.

This leads the discussion to the main argument raised in this section. To conceptualize the relationship between humans and nature only through the mode of production means

> to relapse into a pragmatic conception of the relationship between man and nature which illegitimately annuls the "passive side" of this relationship itself; to pass over in silence the fact that man enters into relation with nature also through hereditary and, even more, through the innumerable other influences of the natural environment on his body and hence on his intellectual, moral and psychological personality (Timpanaro, 1975, p. 41).

If one believes that capitalism develops unevenly– on the economic level as I showed in Chapter 1 or institutionally as students of uneven and combined development argue – it is not anathema to accept that human beings might perceive space independently from a profit-driven logic. Indeed, to believe that the second nature – that of individuals in capitalist societies – completely takes over the first – primordial and pre-capitalist – is quite an extreme position to take. Thus, if capitalism develops

unevenly it also does so in the ideological sphere. This view was also shared by Sebastiano Timpanaro:

> Has this second nature, this "artificial terrain" (as Labriola called it), *entirely* absorbed within itself the *first* nature? [...] Is a conception of nature as mere object of human labour exhaustive, or must nature not also be seen as a force which conditions, consumes, destroys man and – in a long-term perspective – all humanity? (Timpanaro, 1975, p. 16)
>
> [...]
>
> the general aspects of the "human condition" still remain, and the specific characteristics introduced into it by various forms of associated life have not been such as to overthrow them completely (ibid., p. 45).

One argument that can be made as a follow up to Timpanaro is to state that in interacting with their surrounding environment human beings valorise territory also according to political logics. The experiences lived in a space and the consequent perceptions and anxieties then feed back into human ideologies. For my attempt to contribute to a theory of imperialism, the best place to look for ideological unevenness and symbolism is the 'nation'. If one accepts that capitalism is uneven, why should ideology not be uneven? Why should one think that the primary form – the "passive side" as Timpanaro called it – of human-nature relations is swept away by capitalism?

> Technique has interposed modifications, diversions and attenuations of natural influences between ourselves as social animals and nature; but it has not thereby destroyed their efficacy, which on the contrary we experience continuously (1975, pp. 48-9).

This unevenness was also acknowledged by Marx, again in *The German Ideology*, where he stated that there are certain conditions that humans experience during their life and that act like fetters. The extent to which men are able to break these fetters determines the extent to which capitalism break away from nature:

> The conditions under which individuals have intercourse with each other […] appears as an accidental fetter, and the consciousness that it is a fetter is imputed to the earlier age as well (Marx, 1974, p. 87).

Marx hinted at the importance of considering this unevenness with regard to the merging of capitalism with human beings' consciousness, although his confidence in capitalist change remained unconditional. In this widely quoted passage from *Capital, Vol.I,*he admitted that

> [t]o know what is useful for a dog, one must study dog-nature. This nature itself is not to be deduced from the principle of utility. Applying this to man, he that would criticise all human acts, movements, relations, etc., by the principle of utility, must first deal with human nature in general, and then with human nature as modified in each historical epoch (2013, p. 425).

Similarly, Deudney argued that the primordial human drive to security is shaped by historical epochs, but in the passage from one epoch to the other this nature remains a constant element:

> Human security praxis thus occurs 'between two natures', the fixed nature of humans as a species, and the historically variable "nature" of the material environment (2000, p. 88).

This constant is explained by Marx in the following quote. He admitted that the continuously evolving second nature remains constrained by a first nature, or probably more generally by beliefs mature in previous experiences:

> [...] what is designated with the words "destiny", "goal", "germ", or "idea" of earlier history is nothing more than an abstraction formed from later history, from the *active* influence which *earlier history exercises* on *later history* (1974, pp. 57-8).

Marx thought that certain modes of thinking persisted. This is important with regard to nationalism – and its variants, shoots and actualizations. In fact, in *The German Ideology* Marx is even more explicit:

> Since this evolution takes place naturally, i.e. is not subordinated to a general plan of freely combined individuals, it proceeds from various localities, tribes, nations, branches of labour, etc. each of which to start with develops independently of the others and only gradually enters into relation with the others. Furthermore, it takes place only very slowly; the various stages and

> interests are never completely overcome, but only subordinated to the prevailing interest and trail along beside the latter for centuries afterwards. It follows from this that within a nation itself the individuals, even apart from their pecuniary circumstances, have quite different developments [...] (1974, pp. 87-88).

From a very abstract perspective, ideological unevenness is the best description of human beings' intellectual development within a capitalist society, how one should interpret the highly materialist idea that the human first of all need to "eat, drink, have shelter and clothing, before it can pursue politics, science, art, religion, etc." (Engels, 1883). Engels stressed that humans are first of all driven by the pursuit of basic material resources through instruments which are immediate and for crucial requirements. While the instinct for survival and the improvement of human beings is something that cannot be wiped away, it depends on the kind of society human beings have organized for themselves, or to put it simply on what aspect of the material and ideal spheres each society values most. In a capitalist society, competition and the search for profit increasingly put material scarcity and the uneven distribution of resources under stress and accelerate and exasperate people's instincts. Capitalism puts resources under stress because it does not function through the provision of a basic amount of goods, but through economies of scale. While capitalism aims at the production of goods which are dispensable, failing to realize profits generates economic crises, which in turn undermine the provision of basic needs or needs which are not so basic but to which people have become accustomed in periods of economic growth. If these productive forces are based on harsh competition between individuals, it should not be surprising that narratives about the survival of the fittest became popular in the past.
In this sense, it is not at all surprising that geopolitical discourses arose in the 19th century. The importance of consolidating economic growth was central to these discourses, and increasing GDP could only be done through technological improvements, therefore through capitalism.

The implicit element of survival of the fittest is less to praise theories of classical geopolitics and more to acknowledge that within such a social context territory can become central in a way that goes beyond its simple capitalist valorisation. The competition for economic resources that characterizes capitalist societies and by

reflection capitalist states requires the development of a certain level of security on the domestic and international levels. When security becomes an essential element of the realisation of economic goals, a territory which is the object of capitalist valorisation can develop additional values which go beyond explicit economic interest and fall into the realm of security, strategy, history, religion and symbolism.

All this is to say that capitalism does not make territory solely material and alien to all other values in the way Neil Smith understands. It is exactly the contrary, as the intense interaction with territory that capitalism requires makes security crucial, and at certain moments it becomes even more important than economic valorisation itself, and not necessarily because security acts to protect economic interests. The limited availability of resources and their uneven geographical distribution are dramatically compounded by the scarcity artificially created by capitalism, which eventually puts access to resources under strain. On the one hand this becomes a concern for state managers which intersects with their various tasks such as pursuing the interest of corporations, maintaining their prestige and being concerned with the stability and success of the institutions and state they represent. On the other hand this is also a concern for ordinary people, because while primordial instincts are the biological base upon which capitalism has developed scarcity, capitalism has reshaped these instincts so that competition over scarce resources is not necessarily about having access to basic food and water to survive. In this sense, while it is not essential to develop a Malthusian view, it can be agreed that a territory with a small population allows more economic and political flexibility (Hofstadter, 1944, p. 41). But the Malthusian condition – which I do not address here, although it certainly deserves a thorough discussion – is not essential to maintain that while capitalism helps to overcome natural barriers to production and distribution in a system characterized by scarcity and unevenness – think of the availability of a wide range of foodstuffs during the whole year for instance – it also multiplies people's needs – which become less ephemeral and more indispensable. It also increases the speed of interaction of human beings with nature, compounding the conditions of scarcity and inequality.

If a territory is crucial or it is considered such for the prosperous reproduction of a society, or it has been historically such and it still exerts a traditional and symbolic value on that society in the present, the value of that space can easily spill over into the

realm of strategy and security should that territory – or its benefits – be somehow threatened.

For capitalist societies – where masses learn to live off limits in terms of consumption – imperialism becomes a structural necessity. Given the economic and social pressures that capitalism generates, it is important to understand how elites translate these pressures through their ideologies of territory. The way territory is assessed determines how a foreign policy is made which looks to the indirect realization of economic goals but is expressed according to political logics or logics which are materialist but not necessarily in a profit-seeking way. Marxism has the theoretical instruments to incorporate these elements.

3.4.*Wilsonianism-cum-primacy*: the endemic contradiction of US grand strategy

The discussion on how incorporating ideologies in a Marxist framework has provided a different angle to David Harvey's conclusions. Imperialism is the product of a "contradictory fusion' of two logics of power which are the spatially-fixed "politics of state and empire" and the free-flowing "molecular processes of capital accumulation in space and time" (2003, p. 26). While this approach can be applied to the foreign policies of other capitalist states, it fits best the study of American grand strategy. In contrast to other strategic cultures, American nationalism contains a peculiar worldview compared to European nationalisms. As Thomas Jefferson stated "I am persuaded no constitution was ever before so well calculated as ours for extensive empire and self-government" (quoted in Tucker and Hendrickson, 1992, p. 314). In this sentence there is a powerful vignette of the philosophical principles of American geopolitics. As explained in Chapter 1, Jefferson's picture describes an a-territorial form of imperialism. In fact, differently from European imperialism "the American republic sought to incorporate its new territories in the West and the South fully into its federal constitution" (Tooze, 2014, p. 14). However, Hardt and Negri correctly highlighted a friction between the American project's "immanence" and its "finitude", or between the ideology and practice of this variety of sovereignty (ibid., pp. 164, 167). In particular, they noted that this duality

paved the way to different contradictions. The most important for this thesis is the fact that an expansionary – imperialist – thrust to lift the pressure on the domestic order collided with "limitation and control" (p. 165-6):

> Every time the expansiveness of the constitutional project ran up against its limits, the republic was tempted to engage in a European-style imperialism (p. 172; see Smith, 2003, p. xvii).

What are the "limits" of America's grand strategy that the two authors want to draw the attention on? This can be best understood reading Paul Wolfowitz's take on US grand strategy. He stated that "we [the United States] must account sufficiently for the interests of the advanced industrial nations to discourage them from challenging our leadership or seeking to overturn the established political and economic order" (Tyler 1992).

An analysis of Wolfowitz's definition allows the backbone of this thesis to be maintained in the transition from the theoretical to the empirical chapters. On the one hand, America's grand strategy seeks to establish global geoeconomic openness; on the other hand, it ensures that rules upon which such openness is constructed fits America's industrial and security interests – otherwise, (geo-)political solutions have to be found. Therefore, the relation between the two logics – economic and political – is highly problematic. Despite they are "tightly interwoven", the "endless accumulation of capital, for example, produces periodic crises within the territorial logic because of the need to create a parallel accumulation of political/military power" (Harvey, 2003, p. 183).

Put simply, America's effort to keep the global lanes of trade wide opens and to favour other states' beneficial participation within the global economy while maintaining a nationally-informed geopolitical dominance over this system, it creates an endemic tension within American grand strategy itself. This makes it very difficult for political elites to apply their inside/outside logic. Pursuing a strategy of *Wilsonianism-cum-primacy*, that is, the combining of a global Wilsonian triad – peace, free market, democracy – with US geopolitical leadership, produces an oxymoronic global nationalism, a "*complexio oppositorum* of exceptionalism and universalism" (Anderson 2015, 6).

This Janus-faced strategy is prone to geopolitical backlashes and conundrums. In this

sense, the rise of an assertive China can be interpreted as the source of a gigantic, catch-22 that has brought the structural contradictions of US grand strategy to the fore.

While China's investments in the US are skyrocketing, Beijing has pursued an assertive foreign policy in the Asia-Pacific and a revisionist approach in the South China Sea. This tricky relationship challenges Washington, D.C.'s desire to maintain 'the world open enough' for American and global business while "prevent[ing] the rise of any grand challenge" to American power (Harvey, 2003, p. 84). This tension and "bifurcation" of American identity has been highlighted by many authors who refer to the "Thesis" and "Anti-Thesis" of the American creed, "Atlanticism" and "Continentalism" or the "Unionist", "nationalist/imperialist" paradigms (Cha, 2015, p. 746), exemplarists and interventionists (O'Bryen and Barreto, 2014, 179-180), dichotomies which reveal the different viewpoints of scholars but that all tend to highlight an inner tension. In Smith's words,

> By one account, then, the American Century took us beyond geography; by another, it was the geographic century. This contradiction between a spaceless and a spatially constituted American globalism is latent in the global history of the twentieth century (2003, p. 7).

Often simplistically summarized by mainstream authors as a divide between realism and liberalism, this contradiction arises to the extent American universalism has its own engine in the US's economic and military success. It is a "global if nationally centered vision", liberal in theory but authoritarian in practice (Smith, 2003 pp. 11, 27). This tension was best personified by Woodrow Wilson and his "ambition for a new world order premised on a global Monroe Doctrine" (Smith, 2003, p. 9). As Kees van der Pijl put it, while Wall Street exploited Wilson's "Fourteen Points" at its advantage, still after WWII "US geopolitical goals continued to be framed within a basically sphere-of-interest concept that took the division of the world market for granted" (2012, p. 27). This is also the *leitmotiv* of the first chapters of Tooze's *The Deluge* (2014), according to whom power relations between states came down to military muscles rather than values.

But what did Wilson's universalism and America's economic growth have to do with military power and interventionism?

> America quickly realized its interest in ending the intense international rivalry which since the 1870s had defined a new age of global imperialism. True, in 1898 the American political class thrilled to its own foray into overseas expansion in the Spanish-American war. But, confronted with the reality of imperial rule in the Philippines, the enthusiasm soon could not remain detached from the twentieth-century world. The push for a big navy would be the principal axis of American military strategy until the advent of strategic air power (Tooze, 2014, p. 15).

Wilson personified a special (smart?) way to nationalism, whose foundations were the spread of rights and freedom across the globe but according to rules imposed by and convenient to the US and its capitalist ruling class (Tooze, 2014, p. 44). This poses a great dilemma to political elites, which is well represented in Manuel Castells's work, despite with a language that is different from the geostrategic jargon used so far:

> the more a social organization is based upon ahistorical flows, superseding the logic of any specific place, the more the logic of global power escapes the socio-political control of historically specific local/national societies [...] On the other hand, the elites do not want and cannot become flows themselves, if they are to preserve their social cohesion, develop the set of rules and the cultural codes by which they can understand each other and dominate the others, thus establishing the "in" and "out" boundaries of their cultural/political community (Castell, 2009, p. 446).

Ultimately, different groups of political elites will deal with the contradictions of US grand strategy accordingly to their worldviews, which will help them translating *Wilsonianism-cum-primacy* to an operational level in different historical moments and when facing different geopolitical problems.

As seen in the literature, this is why US foreign policy has always swung between different intellectual interpretations of its historical purpose and the use of its power. Many have attempted to develop taxonomies that somehow capture the contradiction I have highlighted. Walter Russell Mead (2001) advanced a distinction between different schools of thought where Hamiltonians wanted to achieve success through a

stable global market, Wilsonians by promoting international institutions and peace, Jeffersonians by avoiding interaction with morally corrupted imperial Europe and Jacksonian by diseregarding foreign policy while maximizing power to strengthen national security.[34] Barry B. Posen and Andrew L. Ross envisioned four different worldviews in US foreign policy: neo-isolationism, selective engagement, cooperative security and primacy (1996).
Michael Mann has framed these tensions in a more materialist way, observing that there have been different phases in the use of military power, ranging from softer forms of informal empire to tougher gunboat diplomacy (Mann, 2008, pp. 13-4; 14-22; 22-45). For the purpose of this dissertation, it seems particularly useful to highlight once more the contribution made by Posen and Ross, who explain that ideological-strategic "alternatives are not entirely mutually exclusive", although

> they contain fundamental disagreements about strategic objectives and priorities, the extent to which the United States should be engaged in international affairs, the form that engagement should assume, the means that should be employed, the degree of autonomy that must be maintained, and when and under what conditions military force should be employed (1996, p. 50).

I will often return to this kind of illustrations in the case-study.

3.5.Methodological statement

Philosophical rationale

In the first three chapters, this dissertation has demonstrated that it is impossible to provide a full picture of the causes, consequences and agents of imperialism without a globally integrated picture. World System or hyperglobalist theories miss out on much national and cultural diversity and on an analysis of political power because of their

[34]On Hamilton's *realpolitik* and Jefferson's continuing revolution see Cha (2015, p. 750-1).

structural analysis of imperialism. Instead, purely elitist and orthodox Marxist approaches such as Miliband's one, do struggle to offer a view that can enrich Marx's base-superstructure lenses.
These perspectives do not solve the problem of economic reductionism. This thesis has not overlooked the centrality of the socio-economic sphere over the political. But as this dissertation has argued across the first three chapters, the Marxian mantra of base-superstructure must be interpreted critically rather than in an orthodox fashion. Firstly, because capitalist development has an incurable tendency to reproduce unevenly across different geographical scales and social, institutional and cultural spheres. While this work has stressed that socio-economic dynamics dominate politics, economic logics are mediated by political interests, culture, demography, institutions, etc. Secondly, because of capitalism's insatiable need for creating profitable economic opportunities, structural contradictions arise. For what concerns this dissertation, such flaws of capitalism produce tension on different levels, within the capitalist ruling class of a country or between domestic and international capital, static and innovative sectors or companies, but also between regions and states. Above all, it is the cause of tensions between political and economic strategies. In fact, these economic contradictions are interesting for this work to the extent they require political solutions where elites may not be willing or able to follow economic logics *tout court*.

Given the structural unevenness of capitalism, one of the limits of the above-mentioned scholarship is the lack of interest for diverse geopolitical strategies of states. Because this work aims at overcoming these limits in an inter-disciplinary fashion, the structure of both theoretical and empirical chapters provide a re-interpretation and application of a blueprint traced by James Rosenau's multi-dimensional model of Foreign Policy Analysis.

Rosenau's objective was not too different from mine. He wanted to investigate "the dynamics of the processes which culminate in the external behaviour of society" (1966, p. 31). Rosenau was disappointed with scholars of his time for the lack of a "general theory" (p. 32) – or "pre-theory" – of foreign policy analysis that explained how external and internal factors intermixed or when predominated over one another. He concluded that the foreign policy of a country cannot be observed in isolation. Instead, foreign policy results from the intersection of different spheres that he called

"idiosyncratic, role, governmental, societal, and systemic variables", but one still has to explain "which set of variables contributes most to external behaviour" (p. 43) or "how to treat each set of variables relative to the others" (p. 44).
From the perspective of this work, Rosenau's contribution is revisited through Marxist lenses. The "systemic" – Chapter 1 and Chapter 4 – is defined as global capitalism and the contradictions it generates in a world fragmented in many states; the "societal" – Chapter 2 and 5 – is the relation between state and the capitalist ruling class and the influence of establishment elites and bureaucrats – the latter overlaps with Rosenau's "role" level of analysis.
However, this work has stated the objective of reasserting the importance of what Rosenau called the "idiosyncratic" – Chapter 3 and Chapter 6 – meaning state managers' worldviews. As explained in Chapter 3, the "idiosyncratic" level is where elites decide what, among an infinite number of options, is the best strategy that makes a synthesis of pressures stemming from the previous two levels – and from other factors that could not be considered in this thesis.

Methodological issues

This approach allows to define geopolitics or foreign policy as product of hierarchically ordered, self-reinforcing and at times contradictory, interconnected determinations of power. The strength of this strategy is that it does justice to both Marx's view on the base-superstructure relation (Marx 1961, 67) and the Marxian holistic perspective on capitalism.

Furthermore, it allows us to incorporate the tension between territorial and economic logics, but also the view according to which Marx's method in Capital is developed in a way that 'new determinations are introduced non-deductively […] the introduction of each more complex determination in Capital adds new content to the analysis' (Callinicos 2009, pp. 81-82).
It follows that the state and above all the people that operate in its key positions of command, do act accordingly to geopolitical codes. These codes only to a certain

extent are dominated by/coherent with capitalist interests – assuming that capitalism has one, homogeneous logic, but this is not the case as Chapter 1 and Chapter 2 argued.

Therefore, the aspiration of the case-study is finding a synthesis of these three levels of analysis in both Obama's foreign policy and the 'pivot to Asia', and to do so within the framework of contradictory forces that characterized capitalism and by reflections US grand strategy.

Existing methodologies offered fascinating perspectives on US foreign policy, however they risk looking at the object of their analysis in isolation from other variables – a notorious flaw of approaches that seek to reproduce the empiricist rigour of science in social science. In particular, this applies to both Van Apeldoorn and De Graaff (2015) and O'Loughlin and Grant (1990), works that I have considered in other parts of the thesis.

While there is great value in how the elitist tradition has conducted research of network analysis (Domhoff 2006, pp. 217–224), this work is trying to go beyond the correlation-causation approach. The rationale of this work is to overcome the *cum hoc ergo propter hoc* and *post hoc ergo propter hoc* logics of works on state power such as – the otherwise invaluable – Karl Marx's *Manifesto* and Ralph Miliband's *The State in Capitalist Society*.

In this thesis it has already been argued that the model of Van Apeldoorn and De Graaff (2015) reveals that big business influences US foreign policy. However, there is very little one can discover in terms of "explaining why state X made a certain move last Tuesday". As I already had the chance of arguing above, there is very little one can deduce from knowing that Chuck Hagel is a former Chevron employee – apart from drawing broad conclusions on American grand strategy. This does not mean that elitist methodologies are worthless, in fact they offer an essential denounce, backed by evidence, that American grand strategy remains prevalently driven by logics of profit that do not take into account the interests of citizens. But this view eliminates any glimmer of individual and national diversity. Anyway, some sections of the case-study explore Obama's relation with ruling class and bureaucrats, reminding that the focus of Van Apeldoorn's and De Graaff's study remains central to any Marxist analysis of the international.

For this reason, rather than focusing on network analysis, this work finds a content analysis more appropriate to the kind of integrated study offered here. The latter however, is more similar to a qualitative discourse analysis because it does not follow an "objective and systematic" method (Domhoff 2006, pp. 220) – for instance, like done by those working on SOTUs.
For what concerns the State of the Union (SOTU) methodology, O'Loughlin's and Grant's is also considered with critical lenses. As the scholars that first launched the SOTU methodology admitted, their analysis was limited by three caveats: "the [SOTU] speeches highlight topics that are at the top of the political agenda in the month of the address. [...] presidents have their own political agendas they promote beyond the range of public notice. [...] U.S. foreign policy is produced by dozens of individuals and is reflected in hundreds of important speeches by government officials each year" (O'Loughlin and Grant, 1990, p. 505).
Furthermore, 'the traditional emphasis on domestic projects in the State of the Union speeches' (Flint et al. 2009, 625) was confirmed in Obama's SOTUs. In addition, the three applications of SOTU that covered respectively three phases of American history after WWII 1946-87, 1988-2008, and 2008 and 2009-16 (O'Loughlin and Grant 1990; Flint et al. 2009; Ambrosio et al. 2010) interpreted these speeches through a word count rather than in a qualitative fashion.

From the viewpoint of this research, SOTUs turned out to be a source that does not allow much analysis. Generally, these speeches are inward-looking. SOTU 2010 (Obama, 2010a) was mainly focused on the economic crisis and terrorism while not hinting at any foreign policy priority. In fact, SOTUs receive more attention and media pressure compared to the many remarks that the president delivers in other occasions. This means that propaganda may prevail over genuine, coherent and analytical thoughts. So one can understand why Obama's tough stance towards China in SOTU 2011 and 2012 had to do directly with domestic interests such as jobs affected by China's cheap labour (Obama, 2011a; Obama, 2012a). Similarly, most of SOTUs 2013 and 2014 were focused on recovering jobs (Obama, 2013a), welfare and taxes (Obama, 2014a). Instead, the 2015 speech seemed to offer few more indications about Obama's foreign policy, hinting in particular at the geopolitical posture of Russia towards Ukraine, and at the Trans-Pacific Partnership and China (Obama, 2015a). However, there is little information in this speech that can be deployed in this thesis.

The only exception among SOTUs is the 2016 speech (Obama, 2016a). In this speech there is, among other issues, considerable attention on foreign policy. This was very unusual, however one should take into account that this was Obama's last SOTU and for the president it represented a chance to offer an overview of the most important efforts and achievements. Against the narrative constructed in this dissertation, Obama highlighted that terrorism remains "priority number one". Nonetheless, this statement runs against plenty of evidence that is offered in some areas of this thesis about what Obama thought of terrorism.

No doubt, this work remains sympathetic to critical geopolitics and to the idea that "the US President is the chief bricoleur of American political life, a combination of storyteller and tribal shaman" (Ó Tuathail and Agnew 1992, 195). Surely, this picture applies well to Obama who often performed like a showman in front of cameras. For this reason, this research was informed by a firm awareness that elites' statements should not be taken at face value.
In fact, SOTUs do not provide a genuine account of foreign policy as there is too much attention on these events for the president to act spontaneously. Furthermore, critical geopolitics, like most intellectual reactions – in its case, to realism and classical geopolitics – it offers very ideological lenses on elites. These lenses are unhelpful for exploring state managers' views without bias. Furthermore, critical geopolitics is 'anti-geopolitics' and therefore strategy disappears from the radar (Haverluk et al. 2014, 21–23).
Still, this work by virtue of its Marxist perspective gives credit to critical geopolitics as much as to elitist accounts.

However, what the elitist and critical geopolitics approaches have in common is that for them the president cannot be an independent figure. Recently, a study on Trump questioned the power that the president has to "implement[ing] a grand strategy in twenty-first century" because "a shifting external environment, the vagaries of America's expanding national security bureaucracy and, most importantly, the constraints imposed by diverse operational demands" lead to "a significant gap between ... rhetoric and behaviour" (Dombrowski and Reich 2017, 1014–5). This argument's specific contents are misleading given its unsystematic definition of the systemic. Furthermore, it is weakened by the idea that because the post-Cold War order is a chaotic one and the international system destabilised by all sorts of threats

from trafficking to North Korea – even though they forget to mention China – the president has less influence than during the Cold War.
This thesis maintains a more nuanced view. It is the opinion of this thesis's author that while the presidency is posed under pressure from many socio-institutional actors and interests – such as corporations and establishment – its prestige allows it to provide an overarching short- to medium-term political direction, influencing the governmental agenda and tilting decisions if a hegemonic consensus on specific issues cannot be reached.

Methodology

A way of moving beyond the limits of above-mentioned approaches is a content analysis of Obama's remarks enriched with and backed by other official documents and secondary sources. This dissertation has explored a wide-ranging list of speeches and documents that covers as much as possible the agencies of American power, even though most of the attention is on the president's approach and worldview. The primary sources on which this case-study relies are the following:[35]

- *Obama:* speeches (49); National Security Strategy (2); interviews (4) = 56

- *Statements, documents and interviews of individuals from the Obama's administrations and other governments:* B. Clinton (5); Bush (5); Carter (4); Kerry (3); Xi (3); H. Clinton (2); Donilon (2); Pritzker (1); Gates (1); John McCain (1); Military interview (1); Jones (1); Navarro and Ross (1); Slaughter (1); Zoellick (1); Panetta (1); Rumsfeld (1); Lake (1); Rice (1) = 36

- *Administration's reports:* Congressional Research Service (5); Energy Information Administration (5); Office of the US Trade Representative (4); State Department (3); Quadrennial Defense Review (3); National Military Strategy (2); US-China Economic and Security Review Commission (annual report, 2); Senate Armed Services Committee (testimony, 4); Department of Defense (2); Department of Treasury (1);

[35] Number in brackets indicates quantity of sources

House Armed Services Committee (testimony, 1); Chamber of Commerce of the United States of America (1); National Intelligence Council (1); Defense Strategic Guidance (1); Centre for Naval Analyses (1) = 36

- *Other documents and institutional reports:* Senate Acts (3); Leaked documents on South China Sea and Indian Ocean (2); Lobby money for elections (2); TTP lobbies funding (1); Declaration of Heads of State and Government (Nato; 1); Lobby money for TPP (1); Xi (1); Council on Foreign Relations (report, 1); IMF statement (1); Investigation on NSA (report, 1) = 14

For what concerns the president, the speeches selected were considered insightful about Obama's view on different matters such as national security, finance, world politics, Russia and China. Furthermore, these sources are a considerable amount and cover the entirety of Obama's presidential mandate.
If Obama's speeches represent the backbone of the case-study, other official documents or statements from Obama's secretaries and aides are used to provide more substance to the claims made in this thesis.
Together with these documents, the case-study relies on a long list of secondary sources that are used to problematize the available primary sources.

Operationalization

As one can see from the distribution of primary sources and from the objectives stated in Chapter 3 and in the Introduction of this work, an important part of the case-study is Chapter 6, where most clearly Obama's worldview emerges. However, Chapter 5 and Chapter 7 also provide a picture on Obama's idea of – respectively – society and foreign policy.

In particular, while Chapter 4 sets the global geopolitical context for the rest of the case-study, the overarching theme across the rest of the thesis is Obama's approach to politics and foreign policy driven by an attempt to resolve the tension between political and economic logics.

The content analysis on these primary sources plays the most important part in informing my view on Obama's worldview, while these documents, unavoidably, are also read through the lenses constructed across the first three chapters. This means that I approach the case-study with both deductive and inductive methods of reasoning, with the aim of providing an integrated picture of systemic, domestic and individual factors. The framework that informs my way of reading Obama's speeches is my understanding of American grand strategy and its contradictions (sections 3.4). However, for what concerns Obama's view of the Middle East and the Asia-Pacific, the key section is 6.6. The other sections on Obama's Wilsonianism and inclusive nationalism are also very important parts of his worldview.

Conclusion

This chapter has performed an important function for this thesis. First of all, it allowed me to showcase my personal argument and contribution to the Marxist debate on imperialism and American grand strategy. This argument allows Marxism to become a more comprehensive theory of geopolitical competition. I explained that Marx was in favour of the idea that nature affects the way human beings think and act and that ideology is not the exclusive product of the mediation that labour operates between humans and the surrounding environment. This point can be stretched to the extent that the existence of human instincts but also beliefs, myths, traditions and anxieties deserve attention from Marxism. Moving on from this, I highlighted that if capitalism develops unevenly from a geographical and institutional viewpoint, one could also argue that this unevenness continues on an ideological level. This section hinted at the resilience of ideas despite the revolutionary power of capitalism. A particular concept that conflates geography, history and symbols is that of nation, which remains highly influential on state managers' worldviews and therefore it has to be incorporated in a Marxist theory of imperialism. I attempted to argue that the stress put on resources by capitalism intensifies human beings' relation with nature – not the contrary, as others have argued. As economic stability and growth greatly depends on the ability to control space, political power can become autonomous when economic resources are crucial to the reproduction of society. Ultimately, this section of the chapter paved the way to a more productive dialogue between Marxism and other theoretical approaches, above all social constructivism and the study of strategic culture that is popular in scholarship of Foreign Policy Analysis.

In addition, this chapter has offered a more empirical representation of the politico-economic duality that characterizes imperialism in a capitalist world order split in nation-states and that has been the theme of most sections of the three theoretical chapters so far. It did so by highlighting the inner contradiction of American grand strategy. It was argued that because the US has always sought to establish global geoeconomic openness while maintaining military dominance, American state managers have to deal with geopolitical dilemmas that stem from the impossibility of achieving such a condition.

This argument led me to affirm that it is essential for a Marxist theory of American imperialism to become acquainted with state managers' worldviews. In fact, different presidents and administrations will attempt to strike a balance between openness and primacy accordingly to their understanding of the world order. This is also the reason why, I explained, the literature on American grand strategy has sought to offer several studies on the competing views that can be found among American political elites.

The chapter concluded with a methodological statement. What this statement explained is that the theoretical chapters followed a hierarchical order which bring together systemic, societal and ideological factors. This pattern will be reproduced in the three chapters of the case-study, where I will analyse the systemic context that Obama faced during his presidency; the relations with and connections to business class and bureaucrats of Barack Obama; Obama's worldview and his approach to American grand strategy. The final chapter will attempt to integrate this all while providing an account of the policy of Obama's "pivot to Asia". What can be noticed in every chapter but the next one is that the inner tension of capitalist states and American foreign policy is present at different levels of analysis and in different spheres of power. In this respect my argument will be that Obama's foreign policy reflected a consistent effort to strike a balance between competing interests.

Chapter 4

Uneven development and a changing global geopolitical order

Introduction

This chapter illustrates the empirical implications of what was discussed in Chapter 1. but at an empirical level. Obama's grand strategy and the 'pivot to Asia' cannot be explained without an analysis of the post-2008 geopolitical order. The international environment of the last decade offers insights for predicting and understanding the logic of US foreign policy.

While other chapters explore the level of agency or – as in Chapter 5 – the level of interactions between structural/societal forces and individual actors, this chapter is strictly focused on the systemic level of analysis and on variations to the global order. The chapter focuses on different interconnected trends. On the one hand it highlights the increasingly important role of the Asia-Pacific in the world, the consolidating position of China in the same region and beyond and the limits to American power. On the other hand, it puts forward an argument that seems vindicated in Obama's and Trump's worldviews – though not in the mindset of bureaucrats. While for many European and Asian states the Middle East remains highly strategic if not vital, the United States is losing appetite for heavy intervention in the region, to the extent that in the near future off-shore balancing and burden-sharing might become the dominant principle.

Section **4.1** sets the context within which the US has developed its grand strategy since the start of Obama's first presidential mandate. In particular, it shows that Obama had to face important financial constraints during the transition towards a post-American world order (Singh, 2012) – compared to the power bonanza of the early '90s.

In this section like in the rest of the thesis, it transpires the problem of the tension between geoconomic and geopolitical logics that is the engine but also the structural limit of US grand strategy. This leads me to advance a perspective with regard to the 'US decline' debate. This work does not engage directly with such a debate because it maintains that while there is uncertainty about an eventual hegemonic shift, China has already acquired enough financial and military power to harm the American economy and state. China in fact, has become both America's most strategic partner and threat from both economic and geopolitical perspectives.

Concluding on China's difficult and slow process of internal reform, this section

highlights that Beijing is constrained to seek an extension of its frontier – both geopolitical and geoeconomic – in order maintain its high GDP growth. This leads the narration to section **4.2**. In the latter, it is provided an overview of China's evolving strategy across Eurasia and the implications for America's grand strategy. While offering an overview of China's One Belt, One Road (OBOR) initiative, the Asian Infrastructure Investment Bank (AIIB) and other projects for geoeconomic engineering, this section shows how China has been gaining ground across Asia.

The following section, number **4.3**, continues this kind of illustration moving the geographical focus towards the Indo-Pacific region. Among the other things, here the chapter aims at illustrating the economic and military reasons that justify America's strategic interest towards this part of the globe. With regard to this, the section stresses the high volume of trade in goods and oil, particularly the trade that goes through the Malacca Strait. From a military perspective, the section highlights the growing geostrategic concerns generated by China's growing naval presence across the Indian Ocean. As OBOR unfolds and carries with it an increasing amount of goods, China aims at securing this trade with its military might, as Great Britain and the United States have done over the last centuries.

After having described why the Asia-Pacific has grown in strategic value, section **4.4** provides a view of the declining geostrategic importance of the Middle East. It is argued that while some areas within this region remain important to US foreign policy-makers – for instance, the Gulf – Obama's "pivot" was informed by a coherent geopolitical logic.

Among other reasons, this argument relies on the fact that the United States is reaching energy independence while strategic patterns of oil transport have in recent years augmented the flow of energy towards the Asia-Pacific.

Ultimately, this chapter provides a picture of the current global order which is reflected in Obama's narrative of the Pacific Ocean and in the emphasis he put on the the Asia-Pacific (as explained in Chapter 6). This portrait demonstrates that at a systemic level of analysis, US-China relations have become a dramatically important issue in international affairs to the extent China poses the biggest geopolitical challenge in the history of American hegemony. Clearly, the current geopolitical balance of power is ripe for a major inter-imperialist rivalry. However, given what was argued in section 4.1 with regard to the inner tension of US grand strategy and the

rise of geopolitical catch-22s, the long-term pattern of US-China relations will be more complex than what the word rivalry can tell. As Chapter 7 demonstrates, Obama's policy towards the Asia-Pacific attempted to merge both coercive and accommodating tactics, signalling alternating patterns of forced cooperation and restrained competition.

4.1.Financial crisis and uneven development: structural constraints to Obama's action

Obama's grand strategy in a nutshell it might have sounded like this: resolving the financial crisis of American and global economy; re-organising the geostrategic focus of US imperialism to remain hegemonic in the Asia-Pacific.
From the viewpoint of American power these necessities were two faces of the same coin, two signals of the weakening of American material and ideological capabilities that constrained Obama's presidential action. Put simply, the American and global financial crisis presented to Obama's administrations three critical, systemic developments. Firstly, the domestic financial crisis produced a complex socio-economic drama. The 2008 crash wiped out $648 billion in between early October 2008 and the end of December 2009, equivalent to an average of "$5,800 in lost income for each of the roughly 111 million U.S. households" (Swagel, 2010, p. 9). The first Obama Administration intervened with a Marshall Plan for the 21st century. The Recovery and Reinvestment Act, with its massive injection of $800 billion was "the largest peacetime economic expansion program in the country's history" (Summers, 2009). Between destroyed jobs and potential jobs to be created by growth, the crisis was responsible for the lack of "9.5 million jobs" by the end of 2009 (National Employment Law Project, 2014, p. 11). But if Obama's administrations fully recovered the number of lost jobs, employment growth was dragged more by low-wage work, which added 1.85 million positions compared to when the crisis started. Instead, in 2014 there were respectively 958,000 and 976,000 fewer mid-wage and high-wage jobs (National Employment Law Project, 2014, pp. 1-2). Ironically,

fast-food was the sector that recovered more quickly (p. 5).
The second systemic scenario was downturn in Europe, together with core-periphery fragmentation between Northen and Southern EU countries, rise of anti-neoliberal resentment and the British referendum on EU membership. These events posed a challenge to the universalist aspiration of the post-WWII US-sponsored order (on the International Order, see Ikenberry, Parmar and Stokes, 2018).
If Asia was increasingly anchored to the global system, it was noted that "financial deglobalisation" was a European issue in the banking sector (McCauley et al., 2017, p. 10-2). Obama showed his disappointment explicitly with regard to austerity and mercantilism within Europe and Brexit, but the United States seemed to have lost the influence that during the Cold War it had on transatlantic partners and citizens.
Meanwhile, these events were tied to different geopolitical issues.
One consequence is that Obama's commitment to multilateralism during the early stages of the crisis was hiding an attempt, common among Western states, to "sharing power" but "on their terms" in order to constrain rising peer-competitors within the rhetoric of "responsible stakeholders in the global system" (Stephens, 2008). But if the crisis carries with itself a "big lesson" this is "that the west [and the US] can no longer assume the global order will be remade in its own image" (ibid.).
The third systemic scenario that was perceived to be in need of more attention is probably the most consequential outcome of the geoeconomic unevenness of capitalism. Obama and others asked themselves if it made more sense, at a time of austerity, to be investing diplomatic and military resources in a region like the Asia-Pacific which, by economic and demographic numbers will offer tremendous opportunities compared to Europe,[36] the Mediterranean basin and some areas of the Middle East.
While for centuries relatively small countries managed to dominate most of the world through their technological advantage – like England – the inception of capitalism within big countries such as China or India acted like a boomerang of US-led

[36] The long-term stagnation in the Eurozone and the declining value of systemic assets in the Mediterranean basin have coincided with growing interests in the Asia-Pacific region, particularly the Indo-Pacific region, which stretches from the Arabian Sea to the South China Sea. It was argued that, according to the logic of rebalancing itself, Europe should not be overlooked because China is investing heavily in the continent. This may lead to either an "Offshore Balancing" near Europe and the Middle East with a potential withdrawal of troops from the mainland, or a "Forward Partnering", which sees US forces enabling the use of partners' military power (Holt 2013). However, it makes little sense of thinking about military competition in Europe between US and the China, as the latter does not have yet the capability of reaching the Old Continentmilitarily.

globalisation, triggering the rise of economic and above all military competitors to mature, slow-growing economies.

In that sense, Obama's concern with the financial crisis was to establish priorities in terms of resource allocations. This is why releasing pressure from longstanding commitments was one logical option for a military budget which since 2011 "has fallen every year for four [...] by a cumulative 15 percent" (Jacobson and Sherman, 2015). Meanwhile, it was reported in 2015 that "Obama's $4 trillion budget sticks to the Asia-Pacific pivot" while crises in Eastern Europe and Middle East were not perceived as structural threats (Francis, 2015; Ratnam and Brannem, 2015). The relation between the global financial crisis and the uneven development of capitalism shows that the consequences of these twin features of world economy go beyond the financial crash of 2008. Globalisation, which in previous decades was a solution to creation of private profit for US corporation "by lowering production costs of imported goods and putting downward pressure on U.S. wages" (Palley, 2012, p. 3), have increasingly placed the US between the devil and the deep sea. This is because China not only has helped to absorb American exports but it also fed the global economy, so important for highly competitive American sectors but also for American consumers. It was argued that "the state wealth Beijing has already amassed, over $1 trillion of which resides in U.S. government-backed securities, gives China ample leverage in shaping the future economic landscape (Burrows and Harris, 2009, p. 30). The "transfers of technology and manufacturing capacity" from the US to China, together with "financial investment in China, and the emergence of a huge trade deficit that over the years has made China the largest foreign holder of U.S. government debt" (Palley, 2012, p. 4), undermined US economic and geopolitical power. The uneven development of capitalism – by which here I mean the structural transfer of wealth from one country to another – while continuing to erode US economic power it might affect the military sphere as American dependence on imported manufacture increases:

> In 1980 non-petroleum goods imports were equal to 30.5 percent of U.S. manufacturing GDP. By 2000, this ratio had risen to 78 percent, and by 2007 it was 96.3 percent (Palley, 2012, p. 5).[37]

[37] On this point see this article on the relation between Boeing and China (Mitchell, 2017).

This not only gives an idea of the risks that in the future US military power might depend on Chinese imports. With regard to Obama's grand strategy, the tension between geopolitical and economic concerns acted as a restraint on retaliation against China's return to territorialism in the Pacific. This is important to explain why the military containment of China not only equalled a sort of hedging strategy which combined engagement and cooperation, but it also constrained Obama to avoid any explicit form of containment and to use diplomatic, economic and cultural arguments – in addition to military ones – for the rebalancing to Asia.

The problem of US-China integration highlights a tension, as David Harvey argued, between the push of successful mobile capital to trade with China and the need of the global economy of a solid locomotive on the one hand, and the decline of another part of American capital together with the financial and geopolitical power of the state. Obama's strategy tried to find a common denominator to all these interests. It was impossible for Obama – and it will be impossible for the coming presidents – to have it both ways. Over the last decades the US has managed to resist the competitive pressures from rising economic powers such as Japan – as in the case of automakers "voluntary export restraint" (VER) obtained by Reagan (Benjamin, 1999, p. 16) – Germany and France – whose adherence within the transatlantic network was dictated by both incentives and coercion. However, China at this stage will not accept these kinds of blackmail that instead could persuade financially strained and occupied countries after WWII.

This dissertation does not intervene on the debate about US decline because in the author's view this remains a risky ground for speculation. However, it is concerned with the implications of China's objective rise provoked by the geoeconomic unevenness of capitalism. Some of those who reject the 'US decline thesis' have argued in favour of American hegemonic endurance, highlighting that the US 'has accumulated great wealth' (Beckley, 2011, p. 51), that China's public debt is hidden in 'investment entities connected to local governments' (Beckley, 2011, p. 60), and that China's exports rely on American consumption and are produced up to 40 % by foreign-owned firms (Saull, 2012, p. 325). For these reasons – among others – while China has become richer, the gap between US and China remains favourable to the US compared to the early '90s. It was said that 'the United States...it is now wealthier,

more innovative, and more militarily powerful compared to China than it was in 1991' (Beckley 2011, 43).

This view however does not take into account the potential of China's reserves and its financial and geopolitical implications. Only in the first eleven months of 2017 "China cashed in a cool $344.4 billion surplus on its U.S. trades. That's an 8 percent increase from the same period of 2016" (Ivanovitch, 2018). This is one of the many indicators that attest how fast China's investment capacity grows in relation to the United States. Compared to China's central bank, the American Federal Reserve enjoys a higher balance sheet. The latter, however, is undermined by the high amount of mortgage-backed securities that were bought during the financial crisis. Instead, as an overly enthusiastic commentator put it on *Forbes* "the Chinese have more money than God" (Rapoza, 2017). Precisely, "China's net foreign investment position stood at about $2 trillion, and its foreign reserves were at an astounding $3.14 trillion. That is by far the world's largest investment potential" (Ivanovitch, 2018). As China attempts to escape the overcapacity trap, and its exports ratio to GDP have been declining since pre-crisis levels, Beijing's policy-makers are exploring both domestic and external solutions in order to decrease China's overreliance on the finance-driven American economy (Hung 2008, p. 169).Domestically, the Communist Party has been planning for internal reforms that should shift the economy from export-led to internal consumption-led (Hung, 2008, pp. 169-172). However, it is believed that converting the economy will be a difficult, slow process to the extent "it will take years for China to digest the overcapacity and debt it built up in the construction and investment boom since the global financial crisis" (Financial Times, 2015). For this reason, and coherently with the discussion had in Chapter 1, Hung observed that"another strategy is to open up and integrate new territories into the world market and to export surplus capital to these territories, where the rate of profit is usually higher than the system-wide average" (2008, p. 152). It is within this logic that very different but complementary projects such as the One Belt, One Road (OBOR), the Regional Comprehensive Economic Partnership (RCEP), the Asian Infrastructure Investment Bank (AIIB), several Special Economic Zones (SEZs) and economic corridors – many of which fall within the OBOR – should be framed.

4.2. The geopolitical global system 1: Rise of China, the value of Eurasia and Africa

At a meeting during Donald Trump's first official visit to China, Xi Jinping portrayed from a Chinese perspective the consequences of the uneven development of capitalism:

> How time flies. Over the past 45 years, historic changes have taken place in the world, in China, and in China-U.S. relations. [...]The world today is experiencing tremendous progress, profound transformation, and major adjustments (Xi, 2017).

This statement included two themes relevant to both this chapter and the entire thesis. Firstly, the financial and geopolitical consequences of uneven development have come to the fore and these have greatly benefited China. Xi Jinping is stating in front of Trump that US-China relations cannot be conceived anymore as some decades ago. A fascinating vignette of China's rise and expansionism is offered by the One Belt, One Road strategy. If OBOR equals to China's grand strategy, one can infer that is clearly attempting to stretch its geopolitical clout on a pan-continental scale. This means that a geopolitical rivalry between US and China has interested and will interest not only the South China Sea – despite this remaining the hottest spot – but it has stretched across Central Asia, the Indian Ocean, the Arabian Sea and East Africa redirecting it away from the Mediterranean basin. This had important implications for the way some, and above all Obama, have been thinking about how to adjust the geographical scope of American grand strategy. The eastern part of the Middle East remains geopolitically geared towards the Arabian Sea and the Indian Ocean, as evidenced by a concentration of drones in Afghanistan, Yemen and Somalia, compared to the decline in interest on North Africa and Syria. Central Asia, Afghanistan, Pakistan and the Gulf of Aden on the one hand and Eastern-Central Africa on the other have a two-fold value. Strategically, Central Asia, the Gulf of Aden, Djibouti and the Arabian Sea host the main Chinese-sponsored pan-Asian routes, while their geo-economic value lies in the natural wealth of Eastern-Central Africa – so central to China's diplomacy

(Brautigam, 2011) – and the resource-rich countries of Central Asia. Afghanistan remained central to Obama's grand strategy in Central Asia, benefiting from its position at the Asian corner of the Middle East and right on China's doorstep, in the middle of the New Silk Road and side by side with the former Soviet republics.[38] Compared to Bush, in fact, Obama put more emphasis on Afghanistan, as Bush neglected Afghanistan and the Taliban due to the ongoing war in Iraq and gave too much freedom to Pakistan although he attempted to grant Iraq and Af-Pak equal status towards the end of his second mandate (Aslam, 2014, p. 140; Standish, 2015). The geopolitical chess also involves India both for its historical rivalry with China and its increasingly tighter alliance with the US. India is particularly concerned about China's installation of facilities for its first blue water navy, including the one in Gwadar, Pakistan's most important port and OBOR's hub. Gwadar will be a terminal for a multi-billion dollar economic corridor between China and Pakistan, which runs partly across contested Pakistan-held Kashmir (Kazmin, 2016, p. 3). As a report written for Donald Rumsfeld revealed,

> Beijing already has set up electronic eavesdropping posts at Gwadar in the country's southwest corner, the part nearest the Persian Gulf. The post is monitoring ship traffic through the Strait of Hormuz and the Arabian Sea […] "The Iraq war, in particular, revived concerns over the impact of a disturbance in Middle Eastern supplies or a U.S. naval blockade," the report said, noting that Chinese military leaders want an ocean-going navy and "undersea retaliatory capability to protect the sea lanes" (The Washington Times, 2005)

This inevitably intersected with the issue of the US's regional allies, and in this particular case with the renewed US-India relation. The intensification of affairs between Washington and New Delhi was also tied to the changing relation between China and Pakistan in the post-Bush era. Pakistan moved into China's geopolitical sphere of influence, buying eight Type 039A submarines from China, which thanks to their ability to operate in shallow waters can be deployed as part of Pakistan's A2/AD system (Ansari, 2015).

It might be argued that this was an important reason for the US to reaffirm the geopolitical value of Afghanistan, together with Pakistan as part of an Asia-centred

[38]On the New Silk Road, see the Financial Times Report (2016).

order. Should the US manage to maintain a government sympathetic to its interests in Afghanistan, this would strengthen the control of a crucial artery of the pan-Asian network of trade and infrastructure which China is already developing. This could allow the USA to interfere with China's project of territorial expansionism dictated by its overcapacity and interest for strategic investments. It was not a Marxist who argued this, but a writer in the *Financial Times*.

> Lenin's theory that imperialism is driven by capitalist surpluses seems to hold true, oddly, in one of the last (ostensibly) Leninist countries in the world. It is no coincidence that the Silk Road strategy coincides with the aftermath of an investment boom that has left vast overcapacity and a need to find new markets abroad. "Construction growth is slowing and China doesn't need to build many new expressways, railways and ports, so they have to find other countries that do," says Tom Miller of Beijing consultancy Gavekal Dragonomics. "One of the clear objectives is to get more contracts for Chinese construction companies overseas" (Clover and Hornby, 2015).

This passage, like the next one, highlight the intersection between economic and territorial logics of David Harvey, or the more mainstream label of economic-security nexus in China's monopolistic imperialism:

> Inside China's borders, the plans focus on China's relatively underdeveloped western and southern regions, which will help accelerate growth and boost employment there, moves which leaders hope will tamp down ethnic unrest in addition to providing jobs and an outlet for the nation's workforce. Outside of its borders, China seeks to benefit from trade and currency swaps—reinforcing the international power of the *Renminbi* as a global trade currency. Securing energy deals will help ensure unimpeded supplies as China's energy demand continues to rise; land-based energy infrastructure specifically can help ease a crippling reliance on sea-borne shipments. With growth in developed economies still sluggish, China sees Asia's developing economies as sources of growth on its doorstep (author?2015; see also Farchy, 2016, p. 1).

Within this geopolitical framework, the launch of the AIIB has assumed a particular significance. The project was dubbed by a journalist of a leading American newspaper as a "humiliating diplomatic defeat" (Perlez, 2015) for the United States. Many have

compared this to the World Bank launch after WWII, although this might be a misleading parallel to the extent the World Bank was only a later product of a process begun with the Reciprocal Trade Agreements Act (RTAA) in 1934 (Wan, 2015, 59). Still, like it happened to the US after WWII with the Marshall Plan, China's access to liquidity is driving pan-continental infrastructural projects under the label of One Belt One Road initiative.

Similarly to what I argued in other parts of the thesis, it is difficult to separate the financial from the geopolitical dimension of this project.
The AIIB is an important back up to a slow-recovering global economy. However, there are evident self-interested benefits to China. The bank will compensate for China's unsatisfactory decisional power in post-WWII International Financial Institutions (IFIs). Furthermore, this will address China's long standing concerns with infrastructures. China was frustrated inside IFIs in recent years for two reasons. Firstly, "the World Bank and the Asian Development Bank failed to deliver on big projects meant to transform backward parts of Asia" (Perlez, 2015), a point that links back to the difficulty of the US and post-WWII institutions to keep up with the pace set by China's investment capacity. Secondly, it took about seven years before the American Congress allowed the IMF to change the voting share for emerging countries, a setting that clearly penalized China more than any other member. Unquestionably, China – who owns a share of 30% of AIIB's budjet compared to America's 16 per cent of the WB's budget – is the country that will benefit most from a pan-continental network of roads and railways, not only for the possibility of spending overaccumulated capital – some argues that the AIIB's budget is not big enough to resolve that issue yet – but mainly for backing the projects of OBOR. The bank will operate with dollars because lending in renmimbi might be difficult for countries with reserves in dollars. But the AIIB will allow China "to find more profitable investment channels for its foreign-exchange reserves, which are now mainly invested in low-yielding US treasuries" (Wildau and Mitchell, 2016). This does not signal a weakness of the renminbi. Rather, it highlights the fact that China is playing a long-term game. Six months after the AIIB was launched the renminbi was included in the Special Drawing Rights (SDR) basket, a measure that "enhances the attractiveness of the RMB as an international reserve asset" and that "will help [China] with the diversification of global reserve assets" (IMF, 2016).

One cause of fear in Washington, D.C. is the AIIB could slowly bring its members under the monetary hegemonic umbrella of Beijing and influence their foreign policies. The issue of membership has geopolitical implications to the extent many American allies like UK, Australia, France, Germany, Italy and South Korea are contributors of the bank. The case of Australia is emblematic and useful for understanding why the economic and geopolitical logics are interlocked within the launch and development of the AIIB.
The intensification of trade with China has become so beneficial to the government in Camberra that the latter does find increasingly uncomfortable to be in a close military alliance with the United States. The rise of this dilemma among other American allies – particularly states in the stagnant Eurozone – might only be a matter of time.

As it often happened, Obama's response was quite veiled. He welcomed the AIIB to the extent Asia and the global economy would benefit enormously from infrastructural investments at a time of austerity. However, he also hinted at the fact that if the AIIB is a truly "multilateral lending institution, then you have to have some guidelines by which it's going to operate" (Obama, 2015e). Put simply, the US sees the AIIB as hostile because the latter may not follow those US-sponsored rules and values adopted by the World Bank and the IMF. Furthermore, prior to joining the AIIB, Australia and South Korea did not join as founding members because of an "American-encouraged refusal" (The Economist, 2014c).
Some of the American concerns are shared by Japan, which could not overlook the launch of AIIB. Japan attempted to push countries from its historical sphere of influence away from the AIIB – Southeast Asia in addition to Australia. Tokyo wanted to undermine the AIIB project because it would be a direct competitor to the Asian Development Bank: "since the ADB has a proven record in assisting Asian development, why the duplication? The AIIB will facilitate the rise of the *yuan* at the expense of the *yen*" (Wan, 2016, p. 69), Japanese politicians worried. In fact, while the ADB's focus is inclined towards the Pacific and the AIIB stretches across Eurasia, it did not go unnoticed that the "AIIB membership overlaps with the ADB original membership in Southeast Asia, South Asia and Oceania" (Wan, 2016, p. 77). In particular, the AIIB has a clear geographical connotation as "non-regional countries will be restricted to hold a total of 25 %" of shares, which means China and other Asian members will share the remaining 70% (Jakupec and Kelly, 2015, p. 33). This is

only another evidence of the sphere-of-influence-logic that drives China's calculations (Jakupec and Kelly, 2015, p. 35). Given the overlap of functions between these banks, countries could decide to invest only in one of the two (Jakupec and Kelly, 2015, p. 35). Because of the financial potential of the AIIB compared to the ADB, and considered that the United States has a limited capacity of investment in Asian infrastructures, the Chinese-sponsored institution seems the obvious choice for most countries.

The US could undermine China's strategy through a cheaper geo-economic engineering, fragmenting the Chinese and Russian hold on their Central Asian peripheries by integrating the region politically and economically with Afghanistan and India, countries over which the USA is more likely to enjoy political leverage. This is not fantasy geopolitics, and it would also help Central Asia, particularly Kazakhstan and Turkmenistan, to diversify energy exports, because

> Chinese companies own close to a quarter of Kazakhstan's oil production and account for well over half of Turkmenistan's gas exports. China's state Eximbank is the largest single creditor to impoverished Tajikistan and Kyrgyzstan, respectively holding 49 and 36 per cent of their government debt (Farchy, 2016, p. 1).

Afghanistan, in US policy-makers view, should benefit from its connection to the Pakistani and Indian markets "and open up new sources of raw material, energy, and agricultural products, creating more jobs in India, Pakistan, and Afghanistan" (Clinton, 2011; Security Assistance Monitor, 2015; NSS, 2015, p. 25). From a geo-strategic point of view, the integration of Central and South Asia places India in a position to bypass its old rival, China-allied Pakistan, thanks to an agreement between Tehran, Kabul and New Delhi to build a modern port in Chabahar and construct roads and rail links running through Zahedan, Zaranj and Delaram, creating a project similar to that in the Chinese-funded Pakistani port of Gwadar (Mallett, 2016, p. 6). For this reason, although Chinese and American views and projects overlap, it is difficult to imagine a long-term co-operative relationship, contrarily to what has been argued by some experts (Kuchins and Mankoff, 2015 p. 4).

Kazakhstan remains at the centre of the geostrategies of at least three great powers (İşeri, 2009, p. 38). Speaking at Nazarbayev University in Astana, Xi Jinping recalled

that Kazakhstan sits on the ancient Silk Road and noted that Eurasian countries were developing fruitful exchanges with China. Xi spelled out China's strategy for the overall integration of a region, offering a market of three billion people with massive economic potential. Regarding diplomatic and cultural relations between Asian countries, the strategy should improve "policy communication" and "understanding". Most strategically, the construction of a pan-Asia transport network would improve "road connectivity", with the ambitious aim being of building "a major transportation route connecting the Pacific and the Baltic Sea." Crucially, together with "unimpeded trade", the Chinese president advocated for the region to enhance its monetary sovereignty, clearly a veiled reference to the hegemony of the dollar.

> If our region can realize local currency convertibility and settlement under current and capital accounts, it will significantly lower circulation cost, increase our ability to fend off financial risks and make our region more competitive economically in the world (Xi, 2013).

The ground for inter-state rivalry stretches as far as Africa, given the availability of resources offered by the continent to societies where the consumption of food, technology and fuel is skyrocketing. It has been argued that "initially China's intention of moving its navy overseas up to the Somali coast produced mixed reactions, until China's actions in the near sea became assertive" (Ali, 2012, pp. 21-2). China opened its first overseas military outpost in Djibouti (2016), showing that Chinese investments have a growing need for security, allegedly because of piracy and in general to protect legitimate economic activities. As it was argued

> If the Maritime Silk Road unfolds as planned, increased trade through the Gulf of Aden and Red Sea will mean more need for anti-piracy missions – which makes it even more crucial for China to have resupply facilities nearby. While the Maritime Silk Road and its overland twin are not military initiatives, it's easy to see how military strategy will follow economic investments. Djibouti, soon to be home to China's first overseas military facility, is a prime example (Tiezzi, 2016a).

Unfortunately, where attempts were made to look at US-China competition in Africa, they were too timid (Eno and Eno, 2014; Lyman, 2006). However, as news agencies reported, John Kerry was the first top US diplomat to visit Somalia in 2015, when

talks on China's base in Djibouti were underway (Associated Press, 2015). It is certainly worth exploring whether China is the reason for the US leading the militarization of sub-Saharan and Eastern African countries like Uganda, Rwanda, Kenya, Ethiopia and Eritrea, despite the fact that their international posture does not require them to be so well equipped. In particular, South Sudan was probably the very first local scenario of a potentially global US-China rivalry (Leoni, 2013), as the US-led process of independence of South Sudan brought Sudan, the close Chinese ally, to lose its to oilfields.
US-China competition in Africa heated up as Beijing's need for resources increased, and this rivalry could also be seen Obama's words when he tried to play the card of "brand America" against China – similarly to how he acted over the TPP – warning African partners about the drawbacks of the Chinese model. As was often the case, Obama's words contained a thinly veiled anti-China rhetoric:

> We don't look to Africa simply for its natural resources; we recognize Africa for its greatest resource, which is its people and its talents and their potential. We don't simply want to extract minerals from the ground for our growth; we want to build genuine partnerships that create jobs and opportunity for all our peoples and that unleash the next era of African growth. That's the kind of partnership America offers (2014c).

I am not arguing that this is a "pivot to Africa", as has been suggested (Matfess, 2013), rather I want to highlight that the "rebalancing to Asia" and US competition with China will also play out over Africa's natural resources. This confirms that the "pivot to Asia" and the inter-imperialist tensions between the US and China are at the very least a pan-continental issue, if not global.

4.3. The geopolitical global system and spaces of rivalry 2: the Oceans

As most of global trade is happening on the sea, naval power has played a crucial role for global hegemons. This dynamic is particularly relevant to US-China relations in Asia. One concern for the Pentagon since before Obama'sterms in office was China and the Asia-Pacific. The Pentagon stated that "the [American] fleet will have greater presence in the Pacific Ocean, *consistent with the global shift of trade and transport*" (emphasis added; Department of Defense, 2006, p. 47). This sentence is key to a discussion of Lenin's theory of imperialism and its thesis on the uneven geographical development of capitalism. This view, in fact, was echoedunder Obama by Secretary of Defense Ashton Carter, who revealed what is at stake in the Asia-Pacific region, and why it is so attractive to the US:

> Half of humanity will live there by 2050; even sooner, by 2030 more than half of the global middle class and its accompanying consumption will come from that region; and the region […] is already home to some of the world's largest militaries, and defense spending there is on the increase (2015).

Carter's portrait is further confirmed by the United Nations, according to which by 2030 "the Asia-Pacific Region will host about two-thirds of the world's middleclass" (United Nations Development Programme, 2013, p. 14).
There are more reasons why these statements can be seen as endorsements of Lenin's thesis. Firstly, they make clear that the US, like other countries, is faced with the necessity and/or opportunity of adjusting the geostrategic focus according to the uneven geographical development of capitalism. Surely, the US was always aspiring to be a global power, but the changes here described demanded a greater emphasis on Asia-Pacific compared to other scenarios. Secondly, they reveal that the United States has an interest in the Asia-Pacific region which goes beyond a duty to guarantee security for the global economy. The US has direct geopolitical concerns in the South China Sea. If Panitch and Gindin's argument that the USA fights wars for the sake of the smooth running of global economic operations is true, why did the US not externalize military responsibilities in the Western Pacific to China, if it was only the health and expansion of the global economy that was at stake there? Why, if the US

wanted to keep global trade wide open, did the TPP exclude an economic powerhouse like China?

This leads to a few more observations. The US underpins the global order as long as it is structured along US-friendly rules – the sections on BIT (7.4) and TPP (7.5) develop around this view. Furthermore, according to a USPACOM admiral, of the $5.3 trillion of global trade that passes through ASEAN waters every year, $1.2 trillion is American (Locklear, 2015, p. 20). Ultimately, this argument is coherent with America's strategy during the two world wars and the Cold War to avert the rise of any power to dominance of the Eurasian land mass (Cronin and Kaplan, 2012, p. 12). However, China's naval power has consolidated in recent years as Beijing's expanding economic interests have developed across the Indo-Pacific sea lanes, leading to a need to patrol them in the way the British and American navies have done over the last few centuries. This element, together with natural resources and geographical obstacles, has been the main point of discussion in several analyses, of which I report some here. The first establishes that the South China Sea

> sits on more oil than any other state in the world except Saudi Arabia. This sea is a crucial line of communication and forms the "demographic hub of the 21st century global economy, where 1.5 billion Chinese, nearly 600 million Southeast Asians and 1.3 billion inhabitants of the Indian subcontinent move vital resources and exchange goods across the region and around the globe". Struggles over who controls this sea, together with China's strategic maritime build-up, has meant that the South China Sea has "become the epicenter of what appears to be a long-term geopolitical struggle in which classical power politics and nationalism are intensifying alongside the rise of China" (Cronin and Kaplan, 2012, 9).

Monopolistic interests intersect with state competition in the South China Sea, as shown by the exploration and extraction of oil. In most cases, private interests align with those of the respective states, although the picture is complex and there are some cross-alliances. ExxonMobil has a licence from the Vietnamese government to explore various blocks, and is said to be exploring other blocks in Vietnam in cooperation with Russia's Gazprom. India's state-run Oil & Natural Gas Corp. collaborates with PetroVietnam. Canadian Talisman Energy Inc. – a partner of the state-owned Vietnam

Oil & Gas Group – is interested in drilling in a block that China has already awarded to a US rival.[39] As Vietnam and China have granted contracts on the same blocks to a Canadian and an American company respectively, it will be interesting to see how this clash will be overcome. In general, this thesis does not address the complexity of private and political relations in the area, but it is important to highlight that many big companies – such as Malaysia's Petroliam Nasional Bhd., Paris-based Total SA (FP), the UK Energy Forum, Shell, Chevron, Petronas Carigali and ConocoPhillips – operate across unclear and contested national boundaries and in most cases are backed by their respective states. It can certainly be affirmed that this complicates international relations in the Asia-Pacific region, as in the case of tensions between China and the Philippines after Chinese vessels threatened a Filipino survey ship working for UK Energy Forum PLC (Wikileaks).[40]

During a testimony to the US-China Economic and Security Review Commission, the testimony made the following observation about China's navy:

> I urge you to keep in mind that by 2020, China could have a navy and air force that outnumber and almost match the technical capability of our own forces in the Asia Pacific. If our military force shrinks because of our own budget problems, we may have sixty percent of our forces in the Asia Pacific region, but 60 percent of 200 ships is far less than sixty percent of a 300 ship navy. That may not be sufficient to deter China or to reassure our friends and allies in the region (US-China Economic and Security Review Commission, 2013, p. 18).

The same report warned that the financial crisis meant that the US would have to choose between "a smaller, modern military and a larger, older one if sequester-level funding continues" (2013, p. 17).[41] Another report explained with more precision that the rationale for the "pivot" remained the Indo-Pacific space. Globally, around 80% of trade by volume and 70% by value are carried over sea between ports (United Nations

[39]It may sound surprising that China awarded an oil field to the USA, but this happened in 1992, when territorial disputes and US-China geopolitical competition were at a very different stage.

[40]For a detailed update on competition over oil fields in the South China Sea, see the International Crisis Group report, 2016.

[41]In Trump's first budget, however, the Department of Defense was the only branch of American administration to see a solid increase in resources.

Conference on Trade and Development, 2015). In particular, the Malacca Strait, 550 miles long and 1.7 miles wide at its narrowest point, sees more than 15 million barrels of crude oil pass through it each day, along with about one third of world trade. Roughly three quarters of China's oil imports come via the strait from the Middle East and Africa, and almost all of Japan's imports come from the Middle East. The strait sees the passage of millions of crude oil every day going to East Asia, plus Japan's and South Korea's supply of liquid gas from the Middle East, mainly Qatar (U.S. EIA 2015; U.S. EIA, 2014). As has been argued "the geostrategic significance of the South China Sea is difficult to overstate" (Cronin and Kaplan, 2012, p. 5) and the entrance to it is a global chokepoint. However, China has collaborated with Myanmar to develop oil and gas pipelines which allow it to import Burmese gas and African and Middle Eastern oil, thus avoiding the Malacca Strait without having to travel as far as Indonesia and the Java Sea, which is an alternative option. The pipeline stretches

> from Kyaukphyu at the Bay of Bengal in the west, traversing the sensitive Kachin-inhabited and northern Shan regions of ethnic unrest to Tuili at the eastern border, into Yunnan province and its capital Kunming (Goh and Steinberg, 2016, p. 60).

Alternatively, the journey through the Malacca Strait could be shortened by about 1000 miles by cutting a canal through the Kra Isthmus. In 2005, it was revealed that China was interested in funding such a project, but high economic and environmental costs dampened enthusiasm. However, the project has made a comeback recently thanks to interest from state-owned LiuGong Machinery Co. Ltd and XCMG and privately-owned Sany Heavy Industry Co Ltd (The Washington Times, 2005; China Daily Mail, 2014). However, it seems unlikely that any power would benefit from the control of the Malacca Strait and the South China Sea if it did not also control the Indian Ocean up to the Arabian Sea.

This may sound like a paraphrase of Sir Halford Mackinder's refrain. In fact, as another report prepared for Donald Rumsfeld by Pentagon contractor Booz Allen Hamilton shows, it makes sense to argue that the "rebalancing" of American interests lies in the South China Sea as much as in the waters East of Suez – the Arabian Sea and Indian Ocean. This report is important for the purpose of this thesis because it reveals that competition over the Indo-Pacific macro-regions is crucial both with

regard to US interests and in order to understand the pan-continental dimension of the "pivot". One point which emerges from the report says that "China is building strategic relationships along the sea lanes from the Middle East to the South China Sea in ways that suggest defensive and offensive positioning to protect China's energy interests, but also to serve broad security objectives" (The Washington Times, 2005). These security objectives, the report continues, are likely to become involved in inter-state competition with a zero-sum game logic: "China […] is looking not only to build a blue-water navy to control the sea lanes, but also to develop undersea mines and missile capabilities to deter the potential disruption of its energy supplies from potential threats" (ibid.). This was confirmed in much more recent testimony about maritime security across the Pacific and Indian oceans, where undersea warfare is a particular concern among military experts: "of the world's 300 foreign submarines, roughly 200 are in the Indo-Asia-Pacific region; of which, 150 belong to China, North Korea, and Russia" (Locklear, 2015, p. 25).

Another testimony elaborates on concerns about China's navy modernization:

> More rein will be given to the PLA, especially the Navy to prepare to defend close to home, secure interests abroad, to instill an ethos of fighting and winning and to demonstrate that China is an international power of significance. Strategically and operationally this means the PLA and PLAN will operate more routinely in consonance with China's two defined regional strategic economic priorities, the "Silk Road Economic Belt" and the "Maritime Silk Road" (Admiral Gary Roughead, 2015).

Given its reference to trade routes, this is probably the statement that most clearly draws a relation between increasing trade and military power. However, all these quotes not only provide an indication of the new direction for the military and geographical vectors of American imperialism during the Obama era, they also reassert the concept of the geo-economic value of territory and the idea that the latter intersects with the geographical concerns and calculations of state managers and military elites. This is important not only so as to bring empirical evidence to the theoretical discussion of this work, but also to reply to arguments such as those of Christopher Layne, who claimed that Taiwan, the Senkaku Islands and the South China Sea may have "no intrinsic strategic value to the United States" (2007, p. 167).

Layne's view is limited in this instance, because control of the East China Sea, for instance, may become a weapon that can be used to blackmail China and interrupt any action it takes that threatens to damage US economic interests in the South China Sea or anywhere else. Against the declinist view, it can be argued that decline does not equal retreat, and this is the sense provided by the above comments, and in particular by the following, taken from a report by the Center for a New American Security, a recently-established Washington-based think tank. According to the report, the views of the American political establishment are informed by concern about the decline of maritime military power:

> Arguably, no metric of relative decline is more worrisome than the possible further diminution of U.S. maritime power. […] with budget cuts in the offing, as well as the mass decommissioning of warships in the next decade because of age, the United States faces the prospect of a Navy with 250 ships or fewer (Cronin and Kaplan, 2012, p. 8; pp. 20-1).

The politicians in charge of guiding the US's military services through difficult financial times are compelled to adapt to these trends. At the same time, it appears unlikely that they – or Obama – would ever have overlooked China's attempt to establish itself as a major naval power in the Indo-Pacific region, the part of the world that sees the most trade. As a writer for *The Diplomat* put it, "any naval strategist worth his salt has read Alfred Thayer Mahan, and will immediately recognize the importance of securing a trading state's SLOCs [Sea Lines of Communication]. China is no exception" (Baker, 2015).

All things considered, it will be shown that while Obama was cautious about adopting a confrontational stance towards China, the wide geographical scope of the military challenge of China was a concern. Given that China's navy showed that Beijing will seek to project power on a pan-continental scale, the perspective of Obama and those around him developed across a broad geographical spectrum and could not remain focused only on the South China Sea.

4.4. The global geopolitical system 3: the Middle East

The worldview that drove Obama's grand strategy was reflected in some systemic trends that pushed for adjustment compared to Bush's days. Attempting to decrease the financial and military resources in some areas of the Middle East was not merely the caprice of a president who had no sympathy for Israel or the Gulf sultanates. While the Middle East remains full of contradictions, and is still important for understanding international politics, it is not anymore at the centre of systemic inter-imperial rivalries. Or pivotal but in a different way, particularly from the viewpoint of Washington, D.C.
Firstly, because the United States is approaching energy independence its imports are dropping to mid-1980s levels (U.S. Energy Information Administration, 2014). In this sense there is not a direct security threat in the region. Secondly, the US has managed to diversify the geography of its supplies over the years, and among its top five oil suppliers only second-placed Saudi Arabia is in the Middle East, the other four being in the Americas. Thirdly, controlling the global "oil spigot", as David Harvey would call it (2003, p. 19), would not serve the purpose of blackmailing China, although it might create serious problems – and for this reason, the US will maintain an eye on the Strait of Hormuz. There are two reasons for this. Firstly, China's energy consumption is still dominated by carbon, while its oil and liquid gas imports are geographically diversified, and the government is committed to further diversification (U.S. EIA, 2014, pp. 11, 26; U.S. EIA, 2015, p. 3; Raval and Kwong, 2015). The only problem would be for US allies in Asia, particularly Japan. But if China were to impede the shipping of Middle Eastern oil to East Asia, Japan would still be able to receive oil from the Americas and West Africa – where the USA is quite active – via the Panama Canal. All things considered, Arab oil remains important for South-East Asia, and if the USA wants to maintain regional hegemony it will have to secure the incoming flow of oil or, more importantly, to exert control over its shipping lanes

To some, this does not justify a decrease of military control in the region, because "even if the United States achieves oil independence, its economy would remain sensitive to disruptions in the global supply of oil and, in turn, to global prices" (Glaeser, 2013, p. 115). However, will unforeseen and destabilizing events in the

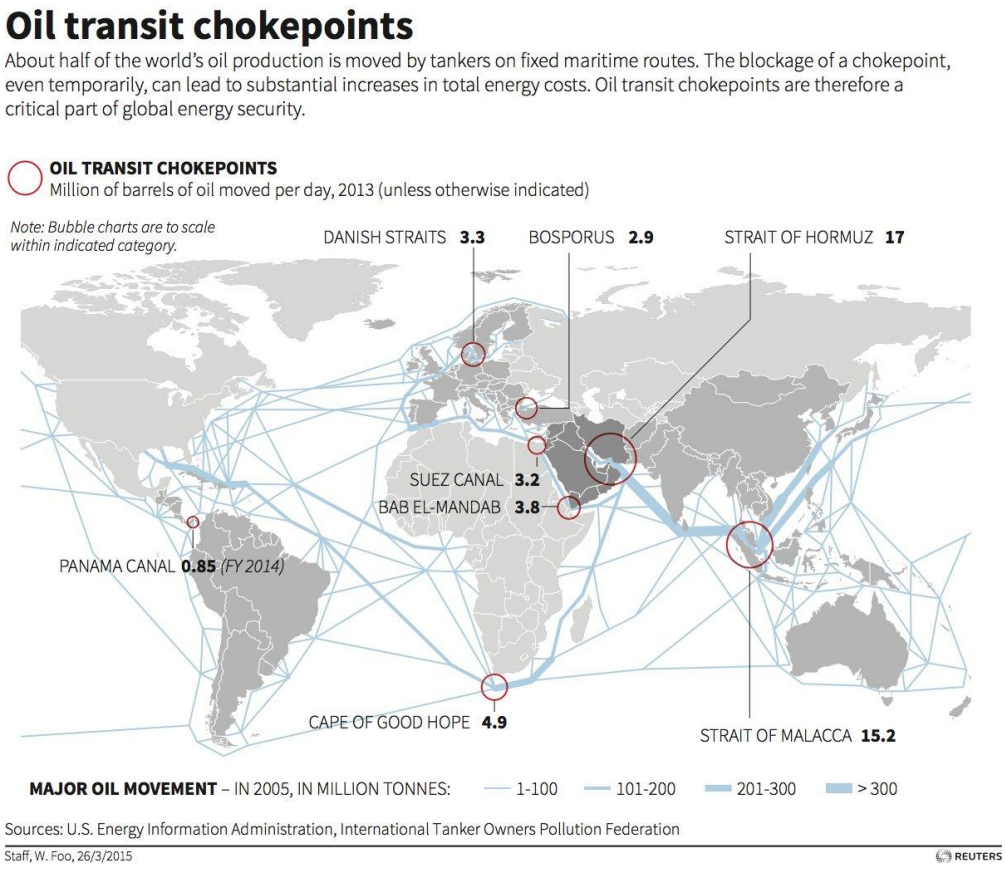
Middle East continue to provide an alibi for a costly military posture? For a president who had brought the country through a massive financial crisis, the answer was negative. It was not only Obama and some of his aides who realized this. As early as 2007, Philip E. Auerswald noted that unstable oil prices eventually have a greater effect on petro-monarchies, which are much more vulnerable and dependent on oil than countries that lack such huge quantities of oil. He argued that the Middle East was also not so strategically important for direct security matters than post-9/11 foreign policy makers thought, explaining, for example, that the threat of nuclear weapons ending in the hands of terrorists was exaggerated:

> If we're concerned about nuclear bomb materials falling into the hands of sub-state actors (that is, terrorists), then the Middle East should not be the main focus of our attention. […] Indeed, if there are regions to which we should pay attention to address the threat of nuclear terrorism, they are less in the Middle East than in North Korea, South Asia, and especially in Russia and the states of the former Soviet Union. More than five years after 9/11, the American public commitment to secure nuclear material in former Soviet space is still inadequate (2007).

The value of this argument for my thesis is two-fold, because it simultaneously shows the interaction between global structural changes and the geostrategic and ideological perspective of political elites. To appreciate this argument about American geopolitical interests and how they changed with the uneven development of capitalism, one can look at the energy trade patterns since the last decade, which show how the Middle East, and certainly parts of it, cannot be considered as pivotal as they used to be:

> Granted, the "middle" in Middle East is there for a reason: shipping lanes vital to global commerce traverse the region. However, the economic and strategic significance of these shipping lanes to U.S. national security is easy to exaggerate. If the Suez Canal and the Strait of Hormuz are vital choke points, they are no more vital to the world economy than the Panama Canal, the Cape of Good Hope, the Strait of Malacca, or, for that matter, the port of Long Beach (Auerswald, 2007).

The way Auerswald presents his argument sounds radical, but he certainly makes a correct point, as shown below by the U.S. Energy Information Administration's map. Even before Obama was elected, the core of world commercial oil transits had already shifted towards Asia.[42] In this sense, Bush's wars in the Middle East seem like a waste of financial energies for US global hegemony but above all a waste of the precious time needed to adjust to new military and economic challenges.



The rebalancing, however, does not imply an abrupt disengagement from the broader Middle East, but a more selective approach to regional issues. As the Asia-Pacific arises to highly strategic world-region, American foreign policy during Obama's administrations moved from Bush's broad understanding to a narrow geopolitical interpretation of the regional, which simply put it splits the area between Mediterranean and Gulf sub-regions. Given the 17 millions of barrels that every day go through it – about 1/3 of all the oil traded over sea routes - the Strait of Hormuz, 21

[42] This is related to the uneven geographical development of capitalism, as illustrated in the second part of Chapter 1.

miles wide in its narrowest point, remains the world's most important energy chokepoint. (for more details on existing pipelines, see Cordesman, 2015).

Steven Simon and Jonathan Stevenson echo Auerswald in arguing that American disengagement is not only driven by geo-economic and geostrategic matters, but also by political opportunism. In addition to the declining monopoly quasi-monopoly on oil resources of Gulf sultanates, there is every reason for the United States to abandon the military-driven presence in the region that characterized the Bush era. Firstly, as showed by Saudi Arabia's increasingly ambiguous approach to terrorism since the beginning of the Syrian civil war,

> The United States' regional partners see themselves as less and less answerable to Washington, and Washington feels less obligated to protect the interests of those partners, which seem increasingly parochial and remote from American interests and values (Simon and Stevenson, 2015).

Of course, to say Washington is an ambiguous way of framing this discourse. While certain policy-makers may be disappointed with Saudi Arabia, oil lobbies may disagree, which only confirms what David Harvey pointed out with regard to the tension between state and capital. Secondly, the geoeconomic value of the region does not justify an expansionary foreign policy, because the Middle East is a "highly dubious place to invest owing to systemic political and economic dysfunction. The region features little water, sparse agriculture, and a massive oversupply of labor" (ibid.). Thirdly, the rise of Islamism has been accompanied by the decline of groups sharing a "pro-Western sentiment – such as national militaries, oil-industry elites, and secular technocrats" (ibid.). Simon and Stevenson argue that under these conditions the USA will apply what realist scholars call "offshore balancing" in the Middle East. I certainly share this personal opinion of these authors, but at the same time not all foreign policy makers will agree, as different groups of elites will appreciate the geostrategic value of Middle East to different degrees. I think the most likely scenario is that the region will become a place for rivalries between resource-poor, crisis-ridden European powers, which will have to overcome the absence of the American emperor. In fact, what both the Libyan and Syrian crises have shown is a renewed activism by the regional powers which will have both an opportunity and a need to fill the gap following the retreat of the emperor. The decreasing US commitment to some areas of

the Middle East is an important cause of the regional geopolitical turmoil of recent years, which has seen Russian and Turkish assertiveness and independent post-American strategies implemented by Israel and Saudi Arabia.

The argument laid in this section has some counterevidence in official American military documents, even though the emphasis that Obama personally put on Asia-Pacific cannot be found at the same way in these documents. Looking at the Quadrennial Defense Review 2014, overall it would appear that the Pentagon's main concerns range from Asia-Pacific to Europe, Middle East, extremist alliances and homeland security (2014, p. v). However, there is a tendency to mention the Asia-Pacific before other issues. China, and above all the kind of military threats that China poses – A2/AD, cyber-warfare, space warfare, etc. – are a principal concern in this document (vii–viii, 3–8), and this is also where the US will invest more in future years (p. 34–35). It must be noted, however, that while Obama singled out the political direction and priorities of its administrations, clearly the Pentagon still wants to project an image of the United States as a global power, therefore as a power concerned with many regional scenarios and transnational threats (vii–xii). With regard to the Middle East, the fact that the Pentagon is referring to a continued presence in the Gulf region might be emblematic of the fact that the US will only intervene for direct threats to oil fields. Furthermore, confirming what stated by both Obama and Donald Trump – see Afterword – the American objective is to "place even more emphasis on building the capacity of our partners in order to complement our strong military presence in the region" (2014, p. 35), so to help the US rebalancing towards Asia in a time of austerity. Similarly, the position of the Pentagon towards Europe states that the logic of austerity will affect the organization of American power in the region (2014, p. 35). Because of austerity there will be "increased levels of risk for some missions" (emphasis added, 2014, iv). Ultimately, there is a stark difference between this Quadrennial Defense Review and the 2006 one, which is mainly focused on Iraq, Afghanistan, and terrorism. While that document revealed that "of the major and emerging powers, China has the greatest potential to compete militarily with the United States" (2006, p. 29), neither China nor Asia-Pacific are indicated among the priorities. Some changes could be observed in the QSR 2010, where it was observed that

> the distribution of global political, economic, and military power is shifting and becoming more diffuse. The rise of China, the world's most populous country, and

> India, the world's largest democracy, will continue to reshape the international system. (2010, 7, 31).

However, Afghanistan, Iraq, North Korea, Iran and Al Qaeda still received most of the attention, even if it must be stressed that military documents can be ambiguous or driven by the logic of politics of alliances.
Still, the statement that "we are positioning forces where they are most needed, exemplified by our rebalance to the Asia-Pacific region as well as our evolving presence in Europe, the Middle East, Latin America, and Africa" (National Military Strategy, 2015, p. 15), is to be interpreted as the consolidation of Asia-Pacific in the geopolitical mental map of military elites, despite this is not as clear-cut as in Obama's discourse.
While the Pentagon, like other agencies of American governments, has confirmed to be willing of cooperating with China, it stated that "we remain concerned about the extent and strategic intent of China's military modernization, and its assertiveness in space, cyberspace, in the Yellow Sea, East China Sea, and South China Sea" (National Military Strategy, 2011, p. 14). American armed forces will not allow "any nation's actions that jeopardize access to and use of the global commons and cyberspace, or that threaten the security of our allies" (National Military Strategy, 2011, p. 14). However, the limit of understanding and predicting American foreign policy through military documents remain, as demonstrated by the fact that it is difficult to get a grasp of the Pentagon's priorities in a more recent document (National Military Strategy, 2015).
For this reason attempting to find a connection between the president's discourse and the geography of US foreign policy it helps understanding what are the priorities on the agenda. Furthermore, this is essential in order to appreciate the intersection between the macro-changes brought by the uneven geographical development of capitalism, the ways these affect American and world politics and Obama's ideological perception of these transformations.

Conclusion

The main goal of this chapter was two-fold. On the one hand, it provided coherency to the structure of the thesis and continuity to the theoretical discussion of Chapter 1. On the other hand, it set the systemic context within which Obama's worldview – Chapter 6 – and Obama's 'pivot to Asia' policy – Chapter 7 – developed. More to the point, the chapter attempted to describe at an empirical level a tectonic shift in the global geopolitical balance of power. This transformation – made more visible by the Great Recession – has greatly affected US-China relations and is the result of both the uneven development of capitalism and the inner contradiction of American grand strategy. Despite this chapter serves as a geopolitical backdrop that will inform partially Chapter 5 and mainly Chapter 6 and Chapter 7, it also put forward some arguments that are worth summarizing here.

Firstly, the Asia-Pacific region has increasingly become a pivotal geopolitical area for American grand strategy, despite the fact it always was important to US global hegemony. This growth in importance of the Asia-Pacific has been caused by the magnitude of its trade, population and resources, but also by the rising geopolitical challenges that the US faces in the region.

Particularly concerning for the US is the assertiveness of China and its economic and political expansionism. The latter, is the consequence of several interconnected, pan-continental and transnational projects among which one finds the One Belt, One Road and the AIIB. Given the vast amount of funds owned by Beijing, both projects, the RCEP and other agreements are a great challenge not only to America's economic power, but also to America's ability of promoting US-friendly regional integration and governance.

Secondly, as it happened with imperial Britain and the US, China's pan-continental trade and economic stakes have slowly driven Beijing's military power beyond China's coasts, in order to securitize to goods and resources. China's claims over the South China Sea – just to offer an example – are emblematic of how the extension of Beijing's geoeconomic reach it requires geopolitical muscles. The US seems particularly concerned with China's rising naval power. Beijing's navy, in fact, will increase its presence from the East China Sea to the Arab Sea and the Somali coast.

Thirdly, if for China the uneven development of capitalism meant tremendous opportunities, in the US the financial crisis influenced and constrained Obama's actions

in several ways. America's military budget grew at a slower pace for most of Obama's years into the presidency. The uneven development of capitalism and the conundrum represented by China influenced very much Obama's choice to pivot. However, it was noted that is difficult to grasp a sense of geopolitical priorities from the many military documents surveyed across this chapter and the rest of this work. Surely, the rise of China and the importance of the Asia-Pacific are highlighted clearly in these reports. Furthermore, while the Asia-Pacific most of the time appears as the first on the list, it is important to reconstruct Obama's geopolitical logic and to understand why and to what extent the 'pivot to Asia' was at the top of agenda. Fourthly, in fact, the chapter explained that while some areas of the Middle East – such as the Gulf countries – remain a highly strategic region for European and Asian states, for the United States at a time of austerity it makes less sense to commit extraordinary amounts of military resources. As showed by Obama's and Trump's approach, one is likely to witness some kind of offshore balancing and burden-sharing that will ensure the global flow of oil.

A provisional conclusion is that Obama's strategy developed in between Scylla and Charybdis. On the one hand, China has become a very important economic partner for the United States. Buying America's debt, investing billions in and exporting cheap goods to the US, China has allowed millions of US citizens to aspire to the (consumerist) American way of life. On the other hand, interdependence with China's is the source of two kinds of anxieties. Economically, China's competition and Chinese immigration have wiped away millions of jobs in some economic sectors. Geopolitically, China has acquired enough power to counter the pressure that the US exerts through economic agreements such as the TPP and its naval activities in the South China Sea.

This tension between political and economic interests can also be noted at the societal level. The quasi-unchallenged influence of Corporate America on political elites it is another cause and facet of the structural friction of US grand strategy. For this reason, the next chapter provides a critical overview of Obama's political background and above all of his relation with capitalist ruling class and the bureaucracy of the national security state.

Chapter 5

Obama, economic elites and the establishment: between crony and democratic capitalism

Introduction

If modern nation-states have developed upon a complex network of power relations, to what extent can individuals implement change? This question is most relevant when looking back at Obama's performance as president. To what extent was Obama coherent with what he promised? And what were the chances he could implement his plans? Was Obama alternative to the environment in Washington, D.C., Wall Street, the Pentagon and other agencies of American power?
The belief of this thesis' author is that Obama was clearly contiguous to America's establishment. However, this is a reductive answer that does not capture important nuances. On the one hand, Obama's political culture and the narrative constructed around the president were central to the reproduction of the American socio-political order – even though it is difficult to know whether Obama was conscious of the origins and implications of his ideas. On the other hand, Obama was alternative enough to produce some concerns. While he never predicated revolution, Obama sought to contrast some policies that were appreciated by financial elites and bureaucrats.

Obama was neither a socialist hero nor the Troy horse that a plutocracy used to buy off lower classes consent. Probably, Obama was a dynamic and skilled individual who believed that capitalism can be reformed and tamed according to a logic of civil (and in part social) justice. While this is not impossible – one might take the relatively positive example of Scandinavian countries – what it turns out is that changing the American system requires much more than one Obama. It was narrow-minded if not naïf to believe that a political star could fix the contradictions of American society.

The chapter that is about to begin, tries to make sense of Obama's political action by examining his views of and relations with the ruling class.
Section **5.1** is an overview of Obama's socio-economic origins and political style. This section's aim is to highlight that, although Obama might have had good intentions, he was a privileged American citizen who received a top-rated education and earned the sympathy of wealthy sections of American society. By exploring one of Obama's biographies with critical lenses, this section links together some elements that are

telling with regard to Obama's compromising style. At the same time, this section acknowledges manifested some difference from establishment politics.
Section **5.2** focuses on an analysis of electoral funds in support for Obama. Looking at funds one can understand what fractions of capital were sympathetic to Obama. It emerges a stark divide between IT industries and Wall Street banks, even though this divide does not have structural implications. The IT sector was clearly supporting the president, while Wall Street's employees were never particularly enthusiastic about Obama. During the 2012 elections it is noted a clear-cut shift compared to the 2008 elections, as Wall Street's employees punished Obama.
Section **5.3** brings together recent literature and journalistic articles on top officials during the Obama presidency and lobbyists. What emerges from this section is that Obama, who was "cleaner" than his predecessors, tried to break the revolving door between big businesses and Washington, D.C. His achievements, however, were limited.
This work and other studies, in fact, found that Obama's governments hosted many Clintonites who advocated for continuity rather than change.
Section **5.4** evaluates to what extent Obama's most important intervention in America's political economy, the Dodd–Frank Wall Street Reform and Consumer Protection Act (Pub.L. 111–203, H.R. 4173), was successful in tackling the power of big financial institutions such as Goldman Sachs and other banks that were responsible for the financial crash.
Leaving the world of politics and business relations behind, section **5.5** explores Obama's performance *vis-à-vis* the national security establishment – mainly the Pentagon. This part of the thesis describes the environment Obama operated in, the people who moved around him, and the continuity and discontinuity between Obama's political action as a senator and as President. It also compares what Obama promised publicly with what he achieved or attempted to achieve inside the rooms of power. What emerges from this section is that Obama's was highly constrained by influential bureaucrats who still nowadays remain ideologically positioned in the post-9/11 bubble of socio-political anxiety. Above all, this section shows that the system is arguably ineluctable by one or a few men and that America's deep state remains the most powerful guardian of continuity. Difficulties experienced by Obama within this environment are an important account of how his project for institutional change was doomed to fail since the very first moment he thought about it.

The conclusion I suggest following the sections on Obama's relations with the ruling class and the security hawks is that he attempted to make some changes to American politics and foreign policy, although not to the extent many voters hoped. Put simply, Obama did not want to challenge the foundations of American power. But, compared to his predecessors, he had different views about crony capitalism and national security. On the one hand, he was less revolutionary than many enthusiastic people had thought in 2008; on the other hand, he encountered resistance from big business, from a Congress controlled by the Republican Party and from the security establishment.

5.1.Who is Obama?

Although I highlighted in several occasions that the Marxist elitist approach would benefit from developing more analytical complexity, I also stated that this remains an extremely important framework to assess the social and cultural background of elites. This approach unveiled important insights with regard to American elites, and it seems equally useful in the study of the Obama Presidency.
Barack Obama's biographical portrait is telling with regard to the president's socio-cultural background and his political views about the United States, capitalism and democracy. Obama was not an Afro-American born in a degraded neighbourhood in Baltimore or New Orleans. Since very young he was part of a privileged section of society. Son of a Harvard graduate, Obama attended Columbia University and Harvard Law School, institutions at the very top of so-called *Gotta-Get-Ins* (Easterbrook, 2004). His professional and political views developed within the confines of American capitalist cultural doctrine. Although Obama's ideas challenged American elites and their politics, these did not undermine capitalism.
Since the very early days of his career, Obama warned his black fellows:

> "Any Afro-Americans who are only talking about racism as a barrier to our success are seriously misled if they don't also come to grips with the larger economic forces that are creating economic insecurity for all workers – whites, Latinos, and Asians" (Mendell, 2007, p. 113).

However, the premises for such a political analysis remained ambiguous. Probably, the next sentence encapsulates that ambiguity which often could be found in Obama's domestic discourse:

> *Any solution to our unemployment catastrophe must arise from us working creatively* within a multicultural, interdependent, and international economy. (emphasis added; Mendell, 2007, 113).

If this was a reference to the necessity of higher democratic control on America's economy and to the need of empowering lower classes, the operational meaning of Obama's creative challenge to capitalism was not tangible.
Obama's aim was "fighting poverty or protecting civil liberties" (Mendell, 2007, p. 124). For him, "everybody's got a shot at opportunity" (Obama, 2005a). As he climbed from Illinois General Assembly to the Congress in Washington, D.C., he wanted to be perceived as a "moral leader" (Mendell, 2007, p. 201) who worked for the "greater good" (Mendell, 2007, p. 203). This was very telling about Obama's alternative idea of politics and the president's belief in a moral form of capitalism – different from the one that had led to the crash of 2007-2008. In fact, the first bill that Obama sponsored in his state's assembly sought to regulate lobbying.
As he stated about the bill, this "sets the standard for us" and shows that "we are willing to do the right thing" (Mendell, 2007, p. 124). Obama was in favour of "good" capitalism, where institutional intervention would protect citizens from market failure in a (watered-down) Keynesian fashion. This Keynesianism was particularly evident during the most famous speech before becoming president. Obama argued that George W. Bush's "dumb war" in Iraq was "to distract us from corporate scandals and a stock market that has just gone through the worst month since the Great Depression" (Mendell, 2007, p. 175).
This, however, was not enough to hide the flaws of Obama's gentle reformism. In fact, some blacks were suspicious about Obama's discourse on inclusiveness and social peace (Mendell, 2007, p. 114). Obama insisted that "I am not running a race-based campaign. I am rooted in the African-American community, but not limited by it" (Mendell, 2007, p. 188). This passage describes well Obama's attempt at bridging long-standing, political and cultural divisions in the US.
Since the years on the board of the Harvard Law Review, many described Obama like

an “open-minded” individual who did not act like a “partisan” leader (Mendell, 2007, p. 90):

> His tenure as *Review* president, would foreshadow his future political style [...] a desire to reach across the aisle and form consensus (Mendell, 2007, pp. 90-1).

If during his time spent at the *Review* he sought to unite liberals and conservatives, during his local campaigns in Illinois Obama was trying to “pull together” liberals and blacks (Mendell, 2007, p. 198). Because of his upper-class image, Obama’s “ability to connect on a broad scale with urban blacks outside his Hyde Park neighbourhood in Chicago was highly questionable” (Mendell, 2007, p. 122). In fact, “some people, especially some blacks, regarded Obama as an “Ivy League elitist” (Mendell, 2007, p. 123). When criticizing the Bush Administration for the mismanagement of the Hurricane Katrina aftermath in New Orleans, his language was “in stark contrast to the anger and frustration vented by black leaders of older generations” (Mendell, 2007, p. 318). Reverend Jassie Jackson was worried and upset by Obama’s approach to race (Mendell, 2007, p. 319).
This however was not just a matter of language, education or appearance. Obama and Michelle were objectively conducting “a middle- to upper-middle-class, white collar existence, going home to a spacious town house in Hyde Park and employing a caregiver to help with childcare”. Their incomes overall “topped at $250,000 a year” (Mendell, 2007, p. 144).
In order to win the Senate race, Obama managed to raise money from influential families such as the Pritzkers – “one of the richest families in the country” (Mendell, 2007, p. 154) – the businessman James Crown and other rich Chicago-based philanthropists (Mendell, 2007, p. 156). As one of his biographers put it, Obama was “a candidate more than palatable to the moneyed and political establishment” (Mendell, 2007, p. 249). He had the ability to occupy both liberal and centrist positions but with a rhetoric that pleased the “whole venture capital industry” in Chicago (Mendell, 2007, p. 249). Furthermore, as he climbed up the ladder of institutional politics, his language changed while his success attracted more resources and experienced staff (Mendell, 2007, p. 252).

If many black voters accepted Obama’s narrative, some scholars were highly sceptical about a black president who was contiguous to political and financial elites.

For these scholars, Obama was "representing a 'Wasp-ified' black elite" (Parmar and Ledwidge, 2017, p. 374). It means that Obama was co-opted by the Wasp "establishment and shares its elitist, secularised religio-racial-in-origin mindsets". It was argued that he embedded "5 key factors for success": "lighter-skinned, white mother, immigrant father, raised by middle class white grandparents, partly in Hawaii and outside the mainstream racial matrix of the USA" (Parmar and Ledwidge, 2017, p. 378). Above all, he "gained the elite educational credentials required for assimilation" (Parmar and Ledwidge, 2017, p. 378, 379). His challenging views of power were both absorbed and shaped by "government, corporate, and foundation-funded programmes of black assimilation through education" (Parmar and Ledwidge, 2017, p. 374) as he studied at "Punahou, Occidental, Columbia, and Harvard" (Parmar and Ledwidge, 2017, p. 378).

Ultimately, Obama was a brilliant and charismatic student who succeeded in the most popular fashion and was taken as example of the resilience of the American Dream. Thanks to his election as president of the *Harward Law Review* Obama appeared on national news for the first time and this "opened up the opportunity for Obama to publish *Dreams*" (Mendell, 2007, p. 89–90).
However, Obama's success was clearly helped by his family's social condition. His was just one positive outcome out of millions of stories of social and economic failure in the United States.

5.2.The people of Obama: Clintonites and the revolving door

Obama's promise for change was a very ambitious one. But judging from his choice of top officials and advisers there was more continuity than change.
Those economic elites he wanted to fight were populating the offices of his government.
In particular, two studies – in addition to this dissertation – highlighted a high presence of Clintonites. It was written that of 413 Obama's appointees, 113 were Clinton administration post holders, 71 studied at Harvard while only a very few were associated to labour associations or to the pro-Obama's think tank Center for

American Progress (Parmar and Ledwidge, 2017, p. 382n). In general, the argument is that Obama's elites showed little differences compared to those of previous administrations, as they were 'overwhelmingly white, male, hold at least two university degrees, with considerable government experience in both Republican and Democratic administrations' (Parmar and Ledwidge, 2017, p. 382). Following this elitist tradition, De Graaff and van Apeldoorn studied the social network of top-level politicians from Clinton to Obama, and concluded that through the revolving door Corporate America is able to lobby the US government for a an "Open Door" foreign policy. This policy, according to them and many other scholars, aims at the maximization of big corporations' profits in a smoothly running global economy. As De Graaff and van Apeldoorn demonstrated, among the key grand strategy-makers of the first Obama Administration 22 individual held "113 corporate affiliations" prior to accepting the governmental role (De Graaff and van Apeldoorn, 2014, p. 44). They also noted that 37% of the corporations connected to the Obama Administration had a Fortune 500 listing. These numbers do not justify the argument that Obama's foreign policy reflects the particularistic interests of businesses. However, this is enough to explain the causes of the US government's propensity to a globalist agenda – enforcement of areas of free trade and capitalist-democratic rule in non-aligned or unstable states (De Graaff and van Apeldoorn , 2014, p. 46). In addition, the 'Obama network' – like the Bush one – intersected also that of the RAND Corporation for what concerns national security and defence. Instead, Obama's top officials had ties with institutes that are popular within the 'Clinton network' and "have a transnational orientation in line with a neoliberal perspective" (De Graaff and van Apeldoorn 2014, pp. 48–49).

Looking inside the picture offered by these authors, one can see that, despite Goldman Sachs' felt under attack by Obama's reforms, the financial colossus was still successful in influencing experienced governmental officials if not Obama himself. It was argued that between the primaries and Obama's inauguration there was an evident turnabout with respect to the economists that Obama choose when he was still competing for the nomination:

> Obama's early team included Paul Volcker, University of Chicago economist Austan Goolsbee, Brookings Institution economist Jason Furman, investment guru Warren Buffett, Republican former SEC chair William Donaldson,

> Republican former Bush Treasury Secretary Paul O'Neill, UBS Americas president and CEO Robert Wolf, and two former chairs of the Council of Economic Advisers, University of California, Berkeley business professor Laura D'Andrea Tyson and Columbia University professor Joseph Stiglitz (Dorrien, 2012, p. 86).

But the new government was a place where people like Stiglitz were clearly not welcome, judging from the background of those who made their way into the rooms of power. "Most of the Democratic brain trust", it was maintained, was close to Goldman Sachs (ibid.). The fresh air that the early Obama team could bring to American political economy was poisoned by an invasion of Clintonites or, to be precise, Rubinite officials close to Goldman Sachs and other big banks. Robert Rubin was Secretary of the Treasury in the second Clinton administration from 1995 and 1999, but before that he had spent a quarter of a century at Goldman Sachs, where he reached the position of co-president. Some of the people who worked with him managed to gain positions of relevance in the Obama Administration, which struck observers with close knowledge of the environment of American finance.

> In ways we may never fully understand, Rubin quickly cast his spell on Obama. Before long, Rubin *protégés* were appointed to the three most important economic positions in the new administration: Timothy Geithner as Treasury secretary, Lawrence Summers as national economic adviser and Peter Orszag as director of the Office of Management and Budget. For good measure, the administration named Mary Schapiro, the head of the Financial Industry Regulatory Authority, Wall Street's dysfunctional self-regulatory organization, as chairman of the Securities and Exchange Commission (Cohan, 2012).

Sheila Bair, former Assistant Secretary of the Treasury for Financial Institutions captured the tension that characterized the president's relation with more senior politicians and the banks that backed them. She lamented that Geithner's nomination to the Treasury "was like a punch in the gut" (Bair, 2012, p. 142). Geithner had been involved in regulating financial institutions that had gone bankrupt or risked doing so, which really did not fit into the strategy for "change" that had contradistinguished Obama's campaign. Furthermore, her opinion provided a sense of how Obama – who

on several occasions took different positions to bureaucrats – was partly forced to take people on board, although he remained wary of Wall Street's influence:

> Without a team of his own, this new, inexperienced President was turning to officials in the former Clinton Administration to staff his own administration. […] it made no sense to turn to the Bob Rubin team to implement much-needed reforms in the financial sector. President Clinton himself said that Rubin was wrong in urging deregulation of derivatives (ibid.).

Somebody else argued that if Obama's economic team looked like a "reunion" of "Clinton-veterans" this was because the president had to accept these influential experts if he wanted his rule to be effective and overcome the opposition of many state officials (Grunwald, 2012, p. 76-7). The elevated number of Clintonites generated a running joke which highlighted an unpleasant truth about state-capital relations during the Obama presidency: "Obama supporters got a president, while Hillary supporters got the jobs" (p. 101). Therefore, Obama's contradictory principle of reformism was encapsulated in the difficulty to maintain promises and to implement a different way of administering public affairs.

But the problem was not only the recklessness and power of Clintonites, it was a structural issue – as Obama's difficulty with lobbying reform demonstrates. At the very beginning of his mandate, Obama signed an executive order that required lobbyists to complete a "cooling-off" period of two years before they could be hired by a governmental agency they had lobbied. Furthermore, the reform prohibited government officials from accepting gift received from lobbies.
In the early stage of his presidency, Obama stated that

> we need to close the revolving door that lets lobbyists come into Government freely and lets them use their time in public service as a way to promote their own interests over the interests of the American people when they leave (Obama, 2009a).

While it is very easy to argue that this was pure rhetoric, Obama's governments were not involved in "the type of conflict-of-interest scandals" of his predecessors (Eilperin, 2015). Still, it was noted that more than 70 Obama appointees served as lobbyists while many returned to it after their mandate ended, and that "at least a dozen former

Obama aides have taken lucrative jobs in the high-tech and sharing economy", with a White House press secretary – Jay Carney – going to Amazon and a senior adviser – David Plouffe – to Uber (Eilperin, 2015). When it was time for approving the Trans-Pacific Partnership in the Senate, the Republican Party endorsed the deal after its senators received on average almost $20,000 from lobbies, ten thousand more than the average given to Democrats (Gibson and Channing, 2015).

It was explained that the potential of Obama's executive order was watered down by several loopholes (Gerstein, 2015). The main issue rotates around the definitions of lobbyists and lobbying. In fact, "behind-the-scenes coordination and supervision activities" have continued. The "cooling-off" period only applies to the directly related area of expertise of an official going into the private sector. Above all, the definition of lobbyist only applies to political appointees, therefore "many key officials can move freely in and out of the revolving door' (Gerstein, 2015).

Another relevant aspect is the issue of bigger donors or fundraisers. Those who collected $500.000 or more to support Obama's campaign, received a position within the first Obama Administration. At least 40% of Obama-appointed ambassadors, in fact, were bundlers. Other positions offered were that of Attorney General – as in the case of Eric H. Holder Jr. – and of chairman of Federal Communications Commission – Julius Genachowski.[43]

The revolving door also worked for what concerns trade. Ron Kirk, one of the two officials in charge of negotiating the agreement, had previously worked as a lobbyist for Merrill Lynch before becoming Trade Representative, a position he held until 2013 (The New York Times, 2015a). Kirk's successor, after two representatives had briefly filled the role, was Michael Froman, a former Citigroup employee and a Rubinite (The New York Times, 2015b). Froman was still receiving a millionaire income from Citigroup at the time he began collaborating with the White House (Zeleny, 2009), while the American government was bailing Citigroup out through tax exemptions (Franks and Nunnally, 2011, p. 249; see also McGregor, 2013). Other officials involved in US trade policy had also had previous relations with lobbies or big corporations. Sharon Bomer Lauritsen, assistant U.S. trade representative for

[43] Obama appointed Nicole Avant to ambassador of Bahamas as she provided $500.000 or more. She then helped Obama with fund-raising in Hollywood (Farnam, 2012) confirming the close relation between Obama the entertainment and technological industry

agricultural affairs, had previously worked as a lobbyist for the Biotechnology Industry Organization (BIO) (Office of the United States Trade Representative, Biographies). Christopher Wilson was deputy chief of mission to the World Trade Organization and had previously been assigned to the WTO to deal with intellectual property, one of the most sensitive issues in the TPP deal. He had also worked for C&M, a consultancy for corporations of a different sort (ibid.). Robert Holleyman, president of the Business Software Alliance (BSA) (ibid.), represented another sector deeply involved in the making of the TPP.

5.3.Who backed Obama?

A close observation to American foreign economic policy demonstrates that the approach of fractions of capital is not a comprehensive one. Every big corporation and business association attempts to bribe candidates, Congress members and presidents. This also applies to Barack Obama and particularly to the free trade agreements he concluded – in Chapter 7 one can see this with regard to the TPP. However, it is interesting to look at some patterns of financial support during the two elections where Obama competed for the presidency – in order to understand which socio-economic blocks sympathized for the president.
Firstly, in both 2008 and 2012 the institution that donated the most money was the University of California (UC), whose links with the IT and high-tech industry are obvious. Meanwhile, companies like Microsoft, Google and IBM – which in previous elections had not been active in any electoral fields – bet on Obama, ignoring the Republican candidates standing in those years. In the past, neither Bush – who showed great sympathy for banks – nor Kerry received such support from the employees of those industries (Open Secrets, 2008; Open Secrets, 2012). This was probably related to the fact that Obama was perceived as a social liberal – like many citizens, employees and corporate elites in the Silicon Valley – and with interests in common with the IT industry. Secondly, it is telling that while in 2008 the employees of important banks like Goldman Sachs, JP Morgan Chase & Co., and Citigroup were among the top donors to Obama's electoral campaign – Goldman Sachs was second after UC – in 2012, the banks' employees were not on the official list of Obama's campaign donors as they had more faith in the Republican, Mitt Romney.

Goldman Sachs, Bank of America, Morgan Stanley, JP Morgan Chase & Co, Wells Fargo, Credit Suisse Group, UBS AG and Barclays together donated more to Romney in 2012 than Obama had received from banks in 2008. Furthermore, while Goldman Sachs was the bank with the most enthusiasm for Obama in 2008, in general the banking sector was more neutral in 2008 than in 2012, when there was a clear right-turn (ibid.). In 2008, John McCain received money from a few more banking institutions than Obama, while the latter received support mainly from Goldman Sachs and JP Morgan Chase & Co, although this was a much more substantial amount than what McCain received (ibid.).

A few observers noticed as I did that during Obama's first two crucial years, when his government was intervening in the financial crisis, Goldman Sachs was not as influential as its managers wanted. The huge Lower Manhattan investment bank was probably upset by the Dodd-Frank Wall Street Reform and the Consumer Protection Act (Pub.L. 111–203, H.R. 4173). Regarding Goldman Sachs' shift between 2008 and 2012, it was stated that

> In the four decades since Congress created the campaign-finance system, no company's employees have switched sides so abruptly moving from top supporters of one camp to the top of its rival […] (Rappaport and Mullins, 2012).

The investigative journalist William D. Cohan highlighted the reasons for this unusual event:

> The antipathy between the financial sector and Obama has never been greater. Eight of Republican challenger Mitt Romney's 10 top donors in the election were Wall Street firms. (Meanwhile, the markets responded to Obama's re-election with a 400-plus point drop) (2012).

The money bet on the Democratic horse in 2008 did not pay off for Goldman Sachs as the bank would have liked, but could it not foresee that the first Obama Administration would lead to some restrictions on the banking system? Why did they support Obama in 2008, anyway? There are several answers to these questions. First of all, McCain was not perceived as a responsible and skilled administrator, and many probably thought that he was not fit to face the worst of economic crises (Dorrien, 2012, p. 75).

Secondly, banks could foresee that Republican candidates would lose the election after George W. Bush's eight very controversial years, so in order not to waste money they followed a bandwagon strategy. A similar logic – giving money to the strongest candidate – may be the reason that the banks supported Obama more than Hillary Clinton, who was clearly closer to Wall Street than the neophyte from Illinois (Open Secrets, 2008c). A more nuanced strategy pursued by the banks might be the following: because the banks knew that Obama had more chance of winning and feared the significant reform of the financial system that might come with his victory, they invested their energy in attempting to "bribe" a potentially difficult president.

5.4.Reforming the "swamp"

As will be discussed later, Obama never appreciated the relation between the US government and Wall Street. His disappointment was manifested on one occasion when he stated that "these guys [top bank managers] want to be paid like rock stars when all they're doing is lip-syncing capitalism" (Cohan, 2011, p. 2). To what extent Obama challenged the system can be observed in his relation to Wall Street. William D. Cohan judged the Obama's administration to be one that delivered

> [a] remarkably Wall Street-friendly set of policies. […] A pretty amazing list of favours, if you think about it. Yet Wall Street clearly thinks it is owed even more (2012).

If this is true, why was Wall Street still unhappy about Obama if he offered it so many favours? Why did the bank show its disappointment by shifting its support for Obama in 2008 to Mitt Romney in 2012? The ire of Goldman Sachs and other banks was provoked by the Dodd-Frank Act, which although it was probably too light-weighted it still made the gambling of the pre-2008 era more difficult – particularly with its rule on the ratio between lending and assets which determined that investments had to be backed by solid financial resources. The Act was certainly an obstacle compared to pre-crisis arrangements, but it was perceived in such a negative way because of the ideological bias of Wall Street's top managers and not because it represented a solid social-democratic shift in US political economy. In the opinion of an expert observer,

> [t]hese moves hardly amount to a Marxist revolution, but, in the eyes of many economists, including supporters and opponents of the measures, they represent a watershed in American economic and political history (Cassidy, 2008).

Others went as far as to argue that the Obama government's intervention following the crisis was a "halfway New Deal", insufficient to resolve certain issues but enough to create enemies (Skocpol, 2012, p. 9; pp. 1-89). While Obama and some of those close to him remained champions of capitalism within a more regulated financial system, the presence of Clintonites guaranteed continuity with previous administrations. However, the crisis had been so harmful that a return to a Keynesianism of some sort could not be averted, although this came in a watered down version because derivatives-friendly personnel within the administration safeguarded the continuity of "too big to fail" banks using taxpayers' money. In such an environment, the Dodd-Frank Act, whose preliminary goal was very ambitious, ended up as an appreciable but still weak attempt to put bridles on casino-capitalism. Law scholars welcomed the overall spirit of the reform – stopping shadow banking, changing government-Wall Street relations and restraining state managers from bailing out banks – but its effectiveness was questioned. Some believe that the proposal from former Federal Reserve Chairman Paul Volcker was originally endorsed by Obama, and the Dodd-Frank Act was approved by the Senate thanks in part to the momentum gained when the Securities and Exchange Commission (SEC) investigated Goldman Sachs, making it look like the "villain" of the crisis (Skeel, Jr., 2011, p. 4). However, in that document "there is no serious effort to break the largest of these banks up to meaningfully scale them down" – something that Stiglitz wanted to enforce (pp. 8, 9). Scholars remained concerned that the positive general framework of the reform would be undermined by the fact that it allowed slippery interpretations (p. 9), and as became clear during the first months of the Trump presidency, some minor changes will undermine the spirit of this legislation without the need to repeal it. In fact, legal scholars agreed that the law was "drafted by the same people who designed the bailout strategy" (ibid., p. 12), and that was weakened by its own loopholes (Wilmarth Jr., 2011, pp. 991-2, p. 997). Overall, however, the Dodd-Frank Act should not be judged with a defeatist attitude. According to Skeel,

> The new framework for clearing derivatives and trading them on exchanges is an unequivocal advance. To be sure, there are substantial uncertainties even

> here. […] But the reforms promise to make the derivatives markets far more transparent than in the past […] (2011, p. 14).

In conclusion, it is difficult to reveal with precision what actions the political-economic establishment took against Obama's attempt to deliver certain reforms, and this is certainly beyond the purpose of this case-study. However, this section has shown the kind of environment Obama operated in and the political obstacles his financial legislation encountered. A similar conflictual dynamic characterized his action with regard to national security and his approach to military intervention. His efforts were aimed at convincing other countries, mainly in Europe, to give up austerity policies in an attempt to maintain the status quo of an open global economy which seems increasingly fragmented.

5.5 Obama's and the national security establishment: between change and resistance

If Obama's reforms were limited by the economic establishment, similar difficulties beset his attempt to alter national security policy. Obama was no revolutionary, he wished to transform politics to an extent and he was hindered in this aim by pressure from the establishment and the bureaucrats in Washington, D. C.[44] Many authors have concluded that Obama kept continuity with Bush (Renshon, 2010), and that in addition to this, some made the mistake of "mishearing" Obama's unrealistic promises (Holland, 2014, p. 3; McCrisken, 2014, pp. 17, 19-20, 23-4). In fact, Obama never denied in his speeches that the war on terror would continue, although Hilary Clinton noted that "the administration has stopped using the phrase" (Solomon, 2009).

Another argument claims that Obama inherited an institutionalized security paranoia from Bush which was difficult to change from within the rooms of power, and thus one viable way for Obama to overcome Bush's excesses was to adopt an approach

[44] Michael Glennon developed the problem of bureaucratic influence on the Obama presidency to a greater legth and by drawing on the theory of Walter Bagehot (...)

aimed at "fighting better and smarter" (Holland, 2014, p. 4). This slogan did not convince everyone, and one writer commented that one should "set aside the administration's conceit of 'smart power,' since only fools (i.e. Team Obama's predecessors) would prefer stupid power", and it was clear that "continuity is the dominant note" (Cohen, 2009). Comments like this are evidence of some frustration, which was increased by the huge expectations people had of Obama, starting with the Nobel Prize committee.

Investigative journalist Charlie Savage argued that Obama and his aides could not erase Bush's legacy of using force and surveillance, particularly in the arena of domestic security. They therefore tried to provide a legal footing for practices which could create embarrassment with the general public and tensions with allied countries. For Savage, this was the result of an argument inside the administration between civil libertarian lawyers – on whose side Obama stood initially – and those who supported stricter security arrangements. According to Savage, the latter won the argument because it was easier to convince Obama after the failed attack by Umar Farouk Abdulmutallab,[45] as he explained in a long interview,

> there were reformist voices in his administration, and…especially the national security state bureaucracy voices who were sort of worried about giving up powers. And suddenly, after that attack, Obama is much more forward leaning. […] And the reformer voices get quiet. The "we better hold onto this detainee," "we better keep this surveillance power," "we better not disclose this to the public" voices get a lot louder. […] It was the Christmas attack that made it visceral and real to not just the people whose job it was to pay exclusive attention to national security matters, but people who had many different jobs. People like the political arm of the White House, people like Obama himself (Greenwald, 2015).

While Savage's account represents a detailed microanalysis which needs to be placed in a broader framework, it is an important insight for the discussion had in the theoretical chapters about state power, and for the dialectic between president and bureaucrats with regard to Obama and Trump. This is central to my argument about

[45] A young Nigerian who attempted to blow up an Amsterdam to Detroit flight on Christmas Day 2009, also known as the "Underwear Bomber".

the importance of understanding what are the different internal dynamics of power and styles of American administrations.
Pfiffner reports some examples of Obama's reformative action encountering resistance. In 2009, the president asked his Attorney General to formulate a plan for some Guantanamo prisoners to be put on trial in the civilian court system (2011, p. 247) – essential if Obama's plan to close the off-shore prison was to be implemented. However,

> Republicans attacked Obama […] and political pressure forced him [to] change […] the administration's stance on these issues from a more "liberal" legal perspective to a more conservative and politically attuned stance (pp. 249; 252).

Even more pressure was generated by the backlash resulting from *Boumediene v. Bush* (2007), when a Guantanamo detainee successfully petitioned for *habeas corpus* to be applied to his case, a decision defended by Senator Obama. Before Obama became president, "22 detainees sued for *habeas corpus* and were released by federal district courts" (Pious, 2011, p. 265), an act which politically overwhelmed the president and sparked tensions both in Congress and among members of the security establishment. Similarly, Pfiffer argued that there was bipartisan pressure on the White House to delay the closure of Guantanamo until the last year of Obama's second term, despite the president issuing an order to close the prison only a few days after taking office (2011, p. 250). According to Pfiffer, this explains the centralization of power that distinguished Obama's administrations: when the president was under attack on these issues, he would stop listening to the Department of Justice or the Attorney General, even when the Department of Justice was making arguments which Senator Obama had promised to fight for (pp. 259-250). It is difficult to verify the authenticity of this argument, but it certainly leaves open a fascinating question.

Others noted Obama's centralization of power, starting with the fact that there were now "400 people on the National Security Council staff [which] both reflects and communicates the centralization of decision-making on an ever-growing list of issues in the White House" (Rothkopf, 2014). This hypothesis is supported by the fact that even the Pentagon, which was responsible for the kind of centralization of power described by Pfiffer, looked with suspicion at the growing numbers. Certainly, White

House-Pentagon relations reached a historic low during Obama's two mandates as president. Obama had four Secretaries of Defence in 8 years – G. W. Bush had one in each administration and Clinton only one for both administrations. Journalists in Washington and New York wrote extensively about arguments between Secretaries of Defence and the president. In his memoirs, Robert Gates – a Secretary of Defence for both Bush and Obama – was frustrated by Obama's handling of the wars he inherited and his distrust of the military (Woodward, 2014). Meanwhile, Leon Panetta complained about the "increasing centralization of power at the White House" and the "penchant for control" that in his case meant that speeches and interview requests had to be submitted for White House approval (De Young, 2015). Hagel, who sometimes had words of appreciation for the president, also left his job slamming the door because of the "close hold" Obama maintained in the White House and his resoluteness over the use of drones (ibid.). Hagel complained about "meddling" and "fifth-level questions that the White House should not be involved in", accusing Obama of micromanaging security (De Luce, 2015).

Ashton Carter, the Secretary of Defense with the most positive relationship with Obama, took a different view to the President on the threat posed by ISIL. To Carter, Obama's assessment seemed too optimistic (Carter, 2015b) – see Obama's view on the Middle East in the second part of this chapter – and Carter was also in favour of a second intervention in Libya at the beginning of 2016,whichdid not happen. The relationship between Defence and the White House reached its nadir with a grotesque incident which cost General Stanley McChrystal his job as Commander of US forces in Afghanistan. McChrystal and other members of the armed forces were quoted in a *Rolling Stone* article making disrespectful comments about Obama's approach to foreign policy and his relation with the military (Hastings, 2010). Obama reacted by firing McChrystal and reasserting the importance of respect for civilian power over the military in a democratic country. He told McChrystal that

> The conduct represented in the recently published article does not meet the standard that should be set by a commanding general. […] That includes strict adherence to the military chain of command, and respect for civilian control over that chain of command (Obama, 2010b).

Ideological and psychological pressure from a paranoid security environment on the one hand, and the *ad hominem* attitude of a Republican Party which seized every opportunity to undermine Obama's political action on the other hand, were serious obstacles to Obama's political action. The president took very different positions on national security and civil liberties from those he had expressed as a senator. In an election speech at Farmington Hills town hall in Michigan, he urged that

> there should be no contradiction between keeping America safe and secure, and respecting our constitution […] when you suspend *habeas corpus*, which has been a principle dating before even our country, it's the foundation of Anglo-American law, which says very simply if the government grabs you then you have the right to at least ask why was I grabbed, and say, maybe you've got the wrong person (2008, mins. 1.40-4.25).

When visiting the Wilson Center, he attacked the Bush Administration's overall approach to civil liberties for putting forward "a false choice between the liberties we cherish and the security we demand" (Obama, 2007), promising

> no more illegal wire-tapping of American citizens. No more national security letters to spy on citizens who are not suspected of a crime. No more tracking citizens who do nothing more than protest a misguided war. No more ignoring the law when it is inconvenient (*ibid.*).

But Obama's town hall rhetoric was almost entirely dropped in the statement that accompanied his signing of the National Defense Authorization Act (NDAA) for 2012 on the last day of December 2011. The statement sounded like it was meant to repair or water down the continuation of Bush-designed policies. When explaining the reasons for his signature, Obama seemed to be extricating himself from some of the contradictory aspects of the legislation on national security, in particular the famous section 1022 of the NDAA, which together with section 1021[46] had been the cause of debate since Bush's approval of extraordinary security measures after 9/11:

[46] Section 1021 of the NDAA for the Financial Year 2012 "affirms" the authority to act against suspect terrorists. This section was developed to "to ensure that section 1022 of the NDAA is implemented in a manner that is consistent with the national security and foreign policy interests of the United States", with a particular focu on detention of non-citizens (for more details see Obama, 2012b, p. 2020).

> I have signed this bill despite having serious reservations with certain provisions that regulate the detention, interrogation, and prosecution of suspected terrorists. […] Our success against al-Qa'ida and its affiliates and adherents has derived in significant measure from providing our counterterrorism professionals with the clarity and flexibility they need to adapt to changing circumstances and to utilize whichever authorities best protect the American people […] (emphasis added; Obama, 2011d).

In fairness, a couple of months later he issued waivers in an attempt to soften some of the provisions of NDAA 2012, but as his directive shows, military detention was being avoided for "national security interests" (Obama, 2012c), and not for a moral stance. Legalizing Bush's approach to national security helped Obama to fulfil his ideological interest and project an image of change and justice for citizens, although contradictions remained. When he signed the National Defense Authorization Act for the 2016 Fiscal Year towards the end of his second term, he admitted that

> [u]nder certain circumstances, the provisions in this bill concerning detainee transfers would violate constitutional separation of powers principles. Additionally, section 1033 could in some circumstances interfere with the ability to transfer a detainee who has been granted a writ of *habeas corpus* (2015j).

Obama showed his "Jekyll and Hyde" persona also when dealing with the role of surveillance. As senator he had campaigned for restoration of some civil liberties, but had voted in favour of the amendment to extend the powers of the Foreign Intelligence Surveillance Act (Govtrack.us, 2008), a decision that outraged some of his supporters (Falcone, 2008). Hillary Clinton voted against the FISA, but it will never be known if Clinton would have voted in favour of it if she had won her party's primaries. In 2005, Senator Obama had lamented that his initiative to reform the Patriot Act had been set aside from the debate in Congress, despite having bi-partisan support.

> Giving law enforcement the tools they need to investigate suspicious activity is one thing – and it's the right thing – but doing it without any real oversight seriously jeopardizes the rights of all Americans and the ideals America stands for (Obama, 2005).

However, in 2011 President Obama agreed to renew the Patriot Act, while the renewal of legislation on the NSA was achieved a few hours before it expired despite some bi-partisan opposition in Congress (The Washington Post, 2011). It is difficult to establish with precision whether Obama was being opportunistic or if he was compelled by long-serving members of the establishment to keep continuity in American politics. Senator Rob Wyden's complaints about bias in the review panel on misuse of the NSA sound as if either other people were deciding on Obama's behalf or Obama had to compromise between different interests. "'These are profoundly different visions,' Wyden said, referring to his disagreements with Obama, Feinstein, and senior intelligence officials" (Lizza, 2013). Wyden lamented that three of the five-member review panel were bureaucrats from the intelligence services (for the report, see Clarke, *et al.*, 2013), one of whom had served as deputy and acting director of the CIA. Wyden characterized this as a "fox guarding the henhouse situation" (Lewis, 2013).

As senator, Obama was willing to fight for some changes, but his aversion to surveillance was never as clear-cut as the left-leaning audience wanted to believe. In fact, in 2006 he attacked the Patriot Act, but then voted for its renewal after the Bush administration welcomed his request to make sure that

> a business that received a demand for records could challenge in court a nondisclosure agreement that accompanied the demand. That was enough to placate some Democrats, including Obama (Lizza, 2013).

When the NSA scandal blew up, Obama stressed the importance of reciprocal trust in relations with other governments, but he then praised the USA's determination to hunt terrorists using powerful instruments. He did this with a veiled irony which probably tasted bitter to Angela Merkel, one of those who had been spied on by the NSA: "we will not apologize simply because our services may be more effective" (Obama, 2014a). Why did Obama solidly defend the NSA? Was it his personal choice, was he constrained as president or was it because others told him to do so? Ryan Lizza concluded that not only did Obama keep bad company, but also that he approached the matter by trying to legalize practices that Bush had begun, which is the argument supported by some of the authors I mentioned earlier.

> Instead of shutting down or scaling back [Bush's] programs, Obama has worked to bring them into narrow compliance with rules – set forth by a court [FISA] that operates in secret –that often contradict the views on surveillance that he strongly expressed when he was a senator and a Presidential candidate (Lizza, 2013).

Lizza's argument might be correct to the extent that Obama attempted to give reform of the NSA a legal foothold by consulting members of Congress and asking

> the Privacy and Civil Liberties Oversight Board to review where our counterterrorism efforts and our values come into tension, and I directed my national security team to be more transparent and to pursue reforms of our laws and practices (Obama, 2013b).

So, while Obama may have intervened directly when he had room to make decisions, otherwise he just had to provide legal cover for abuses of power. While it is difficult determine Obama's personal view on each of these issues, it is not unlikely that as long as there was a certain degree of compliance with constitutional rules he would have accepted a compromise between his pre-election promises and the view of the national security establishment. Here, then, is the continuity with Bush's second term that many have noted, which also explains why Obama was ultimately not "running against the ideological grain of US foreign policy" (Quinn, 2014, p. 58). However this is not to say that Obama, Bush and other administrations are all the same, as this case-study is committed to showing. Also, Obama garnered support on these matters from the people around him. His Deputy National Security Advisor for Homeland Security and Counterterrorism in his first term (2009-2013) – then CIA director John O. Brennan – was not only a supporter of enhanced interrogation and extraordinary rendition, but also acted in an unorthodox manner with regard to CIA conduct. It was against him that the ire of the Editorial Board of *The New York Times* was directed.

> It is hard to believe anything Mr. Brennan says. Last year, he bluntly denied that the C.I.A. had illegally hacked into the computers of Senate staff members conducting an investigation into the agency's detention and torture programs when, in fact, it did. In 2011, when he was President Obama's top counterterrorism adviser, he claimed that American drone strikes had not killed any civilians, despite clear evidence that they had (Editorial Board, 2015).

Meanwhile James Clapper, the director of national intelligence, "admitted lying to the Senate on the N.S.A.'s bulk collection of data" (ibid.). The bureaucratic inflexibility of the security establishment also emerged in June 2015, when Obama attempted to reform the Patriot Act by passing the USA Freedom Act. This upset the security establishment, just as the promulgation of the Dodd-Frank Act had upset Goldman Sachs, and in fact observers considered the contents of the Freedom Act to be

> only a modest improvement on the Patriot Act, but the intelligence community saw them as a grave impediment to anti-terror efforts […] Mr. Brennan […] claimed that recent "policy and legal" actions "make our ability collectively, internationally, to find these terrorists much more challenging" (Editorial Board, 2015).

Conclusion

This chapter has focused on president Obama's relations with those social actors that are considered to be the most powerful in a capitalist state: the economic ruling class and the national security establishment and bureaucracy. On the one hand, the findings of this chapter will taste quite bitter to those that appreciated Barack Obama and that bore some faith in his reformative action. For what concerns political elites' relations with the ruling class, the Obama presidency was far from bringing any element of substantial novelty in government-businesses relations. As some authors who were quoted in this chapter showed, big business has continued to dictate the fundamental principles of American grand strategy. Similarly, Obama could not do much to tackle the interests of the national security apparatus or to prevail against the views of those that populated that environment. Obama's government was packed with professionals who, given their curriculum vitae, were very far from a political-economic model that could overcome the perverse pre-2008 system that.
His direct interventions against Wall Street and lobbies, like the Dodd-Frank Act, were palliatives that in the long term will have a little effect on big businesses' power – and that can easily be rolled back by future presidents. Obama's relation with the bureaucracy also signalled his impotency and the impotency of future presidents. The relation with that section of power was troubled at the very least. The president, at some point, seemed very isolated on issues such as terrorism and security, to the point that he often was compelled to listen to the biased or self-interested advice coming from different governmental agencies. Obama's experience, in fairness, was just a prologue to the kind of opposition that Trump has been facing. Furthermore, not only the deep state exerted its power on Obama, but an ever growing bureaucratic machine and the involvement of the American state in many domestic and international issues do not allow one individual to be in control of events. On the other hand, however, Obama attempted to implement a kind of change that could make American capitalism more democratic – despite the idea of moral capitalism is a flawed one, as I argued in Chapter 1. The fact that he managed to disappoint Goldman Sachs and the military was certainly a remarkable achievement. However, Obama faced a strong opposition to his reforming action, while banks and legislators will easily find loopholes that will nullify his decisions.

Although he and Wall Street were at odds with each other, Obama enjoyed the support of the IT sector, an important section of the ruling class. The latter will in all likelihood become the most powerful section of society as the world economy is increasingly run through the Internet.

What many of Obama's supporters might think nowadays is that, despite all, their hero came out clean from scandals and conflicts of interests that have characterized the experiences of Clinton and Bush, just to name two. However, critical scholarship may see this minor success as just another evidence that, at a time of domestic and international turmoil, the American state needed a fresh leader who could pacify social relations. Anyway, Obama's limited attempt to challenge the system was not allowed to succeed. But also, Obama looked as far as his idea of society permitted him to see. It was clear that his idea for change was not as radical as many supporters and observers wished. As this chapter showed, Obama was since a very young age a member of the elite. This was reflected in his will to close the divide between liberals and conservatives, and to overcome racial politics. Observing this experience, the most meaningful element that emerged in this chapter is that Obama was limited by his own moderate and reformist views of capitalism. He aspired to a very gentle version of Keynesianism and did not implement structural reforms. His battle was driven by 'good ideas' but it was fought within the very legal and ideological boundaries that the system allows.
Ultimately, the judgement of this thesis' author is that Obama remains a member of the elites. His criticism of American capitalism is very narrow-minded. However, his thought and political action deserve to be explored. State theory, in fact, has to take into account the complexities created by democratic politics.

Obama's banal economic views, however, are not an excuse for us to overlook the president's foreign policy worldview, or to consider Obama just like another "shaman". As the next chapter shows, Obama's discourse was still very nationalist but different from that of his predecessors. Above all, he demonstrated a coherent, nationalist understanding of American politics and foreign policy which was central to how he implemented American grand strategy.

Chapter 6

The worldview of Barack Obama

Introduction

As the last chapter showed, Barack Obama was not a novelty within the domain of American politics – apart for the colour of his skin. His critique of capitalist democracy was not radical enough to represent a challenge to the system. In addition to an illustration of the social background and ties of Barack Obama, Chapter 5 also described the structural constraints that any president face when trying to implement change. However, the chapter also admitted that Obama attempted to pursue some changes with regard to economic policies and national security – even though his achievements were limited.

The chapter that is about to begin, instead, provides a non-ideological view on Obama's grand strategy and nationalist narrative that overcomes the *unexceptional president* thesis that dominates existing literature on this American president. Commentators were quite black and white in the way they portrayed Obama's cultural and geopolitical approaches. However, this chapter demonstrates that knowing Obama's nationalist discourse and understanding of the global geopolitics of the US it deserves some attention. Obama's views reflected the idea of a world that was changing and becoming 'post-American' (Singh, 2012) both economically and geopolitically. He interpreted these shifts, increasingly tangible since 2008, according to both his personal life experiences and the ideological background of America strategic culture.
Sections **6.1** and **6.2** offer a literature review of arguments about Obama's personality, nationalist discourse and grand strategy. Of him, observers stated that he was 'post-ideological', 'uncharismatic', 'calm', 'pragmatic', 'rational', 'diplomatic', 'post-racial', 'apologetic', 'non nationalist' and 'anti-American'. Enemies, thought Obama's discourse was at odd with American primacy in world politics; supporters, admired his compromising style; neutral pundits saw a domestic rather than external grand strategy. These observers all agreed that the president neither had a solid global design for American power nor an identity discourse in continuity with American exceptionalism. In particular, Obama's restrained imperialism in the Middle East was interpreted by many as a sign of weakness or indecisiveness.
Instead, it is argued that below his veil of sobriety Obama maintained a logical global

geopolitical view and a historically-informed nationalist discourse, both aimed at consolidating elites' domestic power and American imperialism at a time of internal socio-economic turmoil and growing geopolitical challenges. This grand strategy sat comfortably within the American nationalist tradition, even though Obama's global policy and identity narrative were also driven by the president's autobiographical experience. Ultimately, Obama's approach to American grand strategy and exceptionalism contains both continuities and discontinuities compared to past US administrations. In fact, section **6.3** reconstructs Obama's authobiographical nationalist discourse in the United States, arguing that the president's view was both aimed at pacifying socio-ethnic tensions in American society and at offering a personal portrait of American nationalism. The spirit of inclusivennes that characterized Obama's domestic discourse also applied to his foreign policy. In fact, section **6.4** of this chapter describes Obama's Wilsonian view and the president's – and American – interest in saving multilateralism and the International Liberal Order (ILO) from centrifugal socio-political forces.
Before continuing the illustration into the final part, section **6.5** of the chapter offers a brief account of Bill Clinton's and George W. Bush's views of the global and Asian orders. These can be used by the reader as comparative tool when exploring the final section on Obama's views of the Asia-Pacific. In particular, it is highlighted that while both presidents were concerned with Asia, Obama developed a more comprehensive and coherent narrative and understanding of the value of the Asia-Pacific space. In fact, Obama imagined the "pivot" with "pan-Asian" lenses (Garrison and Wall, 2016, p. 58). Section **6.6** illustrates Obama's views with regard to the decreasing strategic value of Europe and – mainly – the Middle East and the rising importance of the East. From this section, it stems a tangible geopolitical and personal interest that Obama had for the Asia-Pacific.

Ultimately, before approaching Chapter 7, it emerges from this chapter that despite being an outsider, Obama had a clear, coherent understanding of the systemic geopolitical changes that the world order has experienced in recent years. Furthermore, he had a clear idea of how the US should have reacted to these. The structural contradictions of American grand strategy, however, remain visible in Obama's foreign policy.
Trying to square the dilemma of American grand strategy, Obama's worldview

manifested a compromise between his Wilsonian soul, his personal history, and a geostrategic pragmatism that seems increasingly popular in US foreign policy after 2008.

6.1. A non-ideological president?

Many observers did not think that Obama acted according to ideological lenses, let alone a nationalist narrative. This view was shared by pundits across the spectrum of American political culture. Political enemies, sympathetic journalists and academic commentators all considered Obama on the one hand docile and inadequate for the presidency, on the other hand a stylish, modern leader with *savoir faire* and a non-assertive attitude. They all agreed that Obama was a post-ideological president, perceiving this either negatively or positively. Rivals on the right accused Obama of not being committed to "America's exceptional qualities" and the maintenance of America's hegemonic status (Quinn, 2014, p. 57). Many saw him as a "neophyte" or an "apologist", a leader who had taken America to the brink of decline (Valenzano III and Edwards, 2014, p. 176; D'Souza 2012; see Drezner, 2011, p. 57).[47] Some Republicans gave Obama the same treatment Sadiq Khan recently received from Donald Trump. Sarah Palin considered Obama's electorate – and surely the president – as not properly American:

> We believe that the best of America is in these small towns that we get to visit, and in these wonderful little pockets of what I call the real America […] Being here with all of you hard-working very patriotic, um, very, um, pro-America areas of this great nation. This is where we find the kindness and the goodness and the courage of everyday Americans (Leibovich, 2008).[48]

The problem was that "President Obama's administration has steered a course that reflects a preference for caution over confrontation, and which therefore seems to

[47]For an account of recent conservative exceptionalism see Edwards (2011).
[48]*What's the Matter with Kansas?: How Conservatives Won the Heart of America* (Frank, 2005) remains an interesting account of the worldview of Republicans like Palin.

mesh well with an era of declining capability" (Quinn, 2014, p. 56).To some extent the 44th American president was managing the "relative decline of American power" (Quinn, 2014, p. 46).Others argued that Obama's discourse featured a divide between domestic and foreign engagements, acting assertively at home while being cooperative abroad (Valenzano III and Edwards, 2014, p. 181). This view captures both Obama's charismatic style before his American audience and his commitment to multilateralism at diplomatic summits, but reveals little about his ideological discourse. For Leslie H. Gelb the reason for this widespread belief was Obama's attempt to be perceived differently from George W. Bush and his masculine-jingoistic narrative: "Obamanites understood that American military power can achieve many objectives, but not "pacify countries" (2012, p. 20). Obama broke with Bush's version of exceptionalism, driven by slogans like "either with us or with the enemy". In fairness, this was confirmed by Obama himself in a famous interview:"dropping bombs on someone to prove that you're willing to drop bombs on someone is just about the worst reason to use force" (Goldberg, 2016). Many considered his diffidence about classical military power to be evidence of his weakness or of his fine intelligence. Statements like the last reinforced the idea that with Obama American power had drawn back from its quasi-global duties and shifted to multilateralism and appeasement, as opposed to strong leadership. The most aggressive attack on Obama's alleged lack of a super-American ideology came from *The Washington Post*'s Charles Krauthammer, who stated that Obama's attitude "reviles America".

> Obama thinks anti-Americanism is a verdict on America's fitness for leadership. I would suggest that "leading from behind" is a verdict on *Obama's* fitness for leadership. Leading from behind is not leading. It is abdicating. It is also an oxymoron (2011).

Krauthammer was very partisan on this occasion, but judgments on Obama's public image were a matter of perspective. In a honeyed statement of endorsement for Obama published by the editorial staff of *The Washington Post*, what Krauthammer saw as "abdicating" came to represent a very popular left-wing perception of Obama, both as an individual and as historical experience:

> Mr. Obama is a man of supple intelligence, with a nuanced grasp of complex issues and evident skill at conciliation and consensus-building […] Mr.

> Obama's temperament is unlike anything we've seen on the national stage in many years. He is deliberate but not indecisive; eloquent but a master of substance and detail; preternaturally confident but eager to hear opposing points of view. He has inspired millions of voters of diverse ages and races, no small thing in our often divided and cynical country. We think he is the right man for a perilous moment (The Washington Post, 2008).

This was echoed by one commentator, who said that Obama had a "preference for consensus-building over ideology, for problem-solving over partisan bickering" (Taylor, 2016, pp. 3: 13-14, 40-1). Obama, one writer argued, was working for the redemption of America after the controversial policies of Bush (Renshon, 2012, particularly pp. 97-8). While it seems impossible to find common ground between right-wing and left-wing opinions on Obama, these arguments all agreed on his lack of an ideological stance appropriate for a global power like the US. Both friends and enemies criticized and appreciated Obama for being an unexceptional president. A more pragmatic opinion was that he offered a "personality and identity" but was not incisive in shaping the "country's identity in any significant way" (Menaldo, 2014, p. 199). Obama proposed neither an American fundamentalism nor a *grandiose* narrative of American power. In fairness he maintained that "I, like any head of state, reserve the right to act unilaterally if necessary to defend my nation" (2009h). However, he also stated that not to be "a particularly ideological person" (Rucker, 2013). After such a statement, what could analysts think? But judgements on Obama were probably misled by comparisons with his predecessor. Realizing that Obama's worldview was less interested in power, writers could only conclude that he was a normal president. But they failed to see that he had come up with a sophisticated version of American nationalism posited on the adaptation of American foundational narratives to 21st century America, which confirmed the inclusive power of that culture compared to old-fashioned European nationalism.

6.2. Without a grand strategy?

If many observers felt lost with regard to Obama's ideology, the Obama doctrine was understood as hesitant, confused or even non-existent. Obama's reaction to the Arab Springs and the following regional crises was to blame for such an impression among experts. For a country which has been frequently involved in military interventions and covert operations in Europe and Middle East since WWII, the change that came with Obama was remarkable. George W. Bush's foreign policy in the Middle East was one of the principal causes for such a shift, even though, as this paragraph demonstrates, Obama had a complex understanding America's global geopolitics after 2008 that went beyond a mere instance to return to normality after the 'imperial overstretch' of Bush.

But observers could not find a consistent pattern in Obama's grand strategy. Gelb stated that "without strategy and without economic renewal to power it, Obama neither has achieved lasting strategic breakthroughs nor laid the groundwork for them later on" (2012, p. 19). This just added to the pile of written material portraying Obama as a moderate coward, a concept formulated with more elegance and kindness by Ryan Lizza, who came up with the successful slogan "leading from behind". This was a legitimate argument, because it looked at Obama's foreign policy in the Middle East, and particularly in Libya, but it was undermined by its narrow geographical and temporal focus.

Lizza was a vehicle for most analysts' and citizens' idea of Obama when he reported that the president's foreign policy was "so at odds with the John Wayne expectation for what America is in the world" (ibid.). The reference to John Wayne is very telling of how Americans, including both expert observers and politicians, interpret the lack of a manifestly muscular foreign policy as a demonstration of weakness and acquiescence. Many felt unhappy about Obama's attitude. To a certain audience he did not look like a commander in chief in the Middle East as he supported "whoever is in power at the moment" (Rubin, 2013) – with reference to the Arab Spring. These opinions were reflected in a comment which compared his foreign policy to Yogi Berra, because it embedded the "credo of all who want to avoid tough choices, to whenever possible have things both ways" (Rothkopf, 2014). In other words, the

Obama Doctrine had “halfway measures and ambivalence as an operational organizing principle […]” (ibid.). This frustration with Obama’s indecision was also expressed by William C. Martel, who listed three essential principles for every grand strategy: strengthening the domestic foundations of American power, exercising leadership abroad against the most imminent threats and engaging with allies to deal with world problems (2015, p. 303). For Martel, without a grand strategy Obama was trying to find a balance between these principles and pursuing “overlapping priorities” (p. 304, 326). Gelb instead stressed the inconsistent organizational principles of Obama’s grand strategy: “Obama appears to think that common sense and flexibility constitute a strategy” (Gelb, 2012, p. 21). Another writer thought that the drones were the pillar of Obama’s grand strategy (Rohde, 2012)

Others thought that the grand strategy of the first African American president was to just step back from grand strategy. Stephen Sestanovic from Columbia University argued that Obama “appears to have had a personal, ideological commitment to the idea that foreign policy had consumed too much of the nation’s attention and resources” (quoted in Goldberg, 2016). It is true that in the aftermath of the George W. Bush presidency, foreign policy became a stifling subject, and this was reflected in the first two years of Obama’s government. Back then, most of the focus was on the domestic arena, and the 2010 National Security Strategy portrayed an approach to American security which was not unusual and which did not formulate any new or specific trajectory of American power. Some took a strong view that Obama’s grand strategy was inward-looking, presenting a “modest and conciliatory American stance abroad” (Dueck, 2015, pp. 34, 55). Dueck noted that “international accommodation and retrenchment by the United States” were the features that most distinguished the Obama Doctrine from the George W. Bush presidency (p. 46). Dueck judged US foreign policy over the last seven or eight years, concluding that Obama was a moderate, adopting a liberal stance on “healthcare, financial regulation, and same-sex marriage”, issues which had priority over commitments abroad (pp. 6; 8). Similarly, Edward Luce claimed that not only did Obama’s administrations divert their efforts to domestic problems, but they also just followed the popular mood rather than leading it: “the US public is tiring of its country’s global responsibilities. […] In this he is only taking his cue from domestic sentiment” (2014).

Observers were confused by the combination of the superficial look of Obama's foreign policy and his personal rhetoric. For instance, Mark Indyk's comment that Jeffrey Goldberg's article did "more to help the president define and explain "the Obama Doctrine" than previous efforts by the White House itself" (2016) shows how little attention was paid to Obama's statements and his administration's actions. But beyond Obama's performance, it seemed to observers that the US had lost the compass for a grand strategy that had been in "deficit" since the end of the Cold War (Gaddis, 2009, p. 2; Gelb, 2010, p. 21; Friedberg, 2007-08). Even if this last argument seems more solid, from the perspective of this work a global American grand strategy has continued since the Cold War, and also since George W. Bush.

I believe what Drezner calls "counterpunching" (2011, p. 58) was a "rebalancing" towards Asia, the deal with Iran and disengagement from Middle East, as well as a new geostrategic perspective focused on the Asian continent, the Pacific Ocean and the Indian Ocean. Often the geography of Obama's grand strategy was not appreciated. Aprofessor from the London School of Economics went as far as to argue that the Obama doctrine lacks a geographical perspective:

> While his predecessors have articulated foreign policy doctrines that address specific ideologies or geographies, when asked to describe the "Obama doctrine," the President has chosen not to respond directly, but explained that the United States must act with other countries (Gerges, 2012, p. 1).

Even a commentator as expert as Niall Ferguson tripped up on the geography of current US foreign policy in a Newsweek article in which he launched the following outcry: "tragically, no one knows where Barack Obama's map of the Middle East is" (2011). Ferguson was wrong, because – in contrast to what Güney and Gökcan argued (2010, p. 33) – Bush's Greater Middle East is an ideological and geographical construct that now appertains to the past.
Obama's worldview portrayed a global geography that sat well in the time he was president.

6.3. The politics of Obama's worldview: inclusive American nationalism

On the one hand, people like Sarah Palin were acting as pyromaniacs of the social resentment spreading across "small town America" and attempting to take advantage of citizens' frustrations in a nation with rising rates of suicide and drug addiction (Luce, 2016; Kolata, 2015).[49] In contrast, Obama was the fireman who attempted to sweeten both the socio-economic drama and the demographic revolution for his audience. He developed a narrative drawing on his personal, autobiographical reinterpretation of important strands in the Manifest Destiny literature. He did not abandon exceptionalism, as many thought he had, but if anything he adapted it to the social, demographic and geographical changes that have shaken the United States in the 21st century. He provided a reinterpretation of this tradition by filtering it through his biological features, family experiences and geographical origins and applying it to 21st century American politics and international relations. He ultimately demonstrated better than others how flexible and inclusive of historical change American nationalisms compared to those of other countries. He made use of this narrative according to his approach to politics but also according to the American elites' need to tackle social discontent. The nationalism of the first Afro-American president was less geared to manifesting power against an alleged outside and more committed to dignifying the most fundamental constitutional principles that allegedly made his country exceptional, as was clear from the 2004 Democratic convention. With soft but solid charisma, he confidently handled the traditional values which for the founding fathers were the ultimate evidence that America was different from Europe. In a famous speech he said,

> [a]longside our famous individualism, there's another ingredient in the American saga, a belief that we are all connected as one people. […] It's what allows us to pursue our individual dreams, yet still come together as a single American family: "*E pluribus unum*," out of many, one (Obama, 2004a).

[49] While the socio-economic divide played an important part in producing these divisions, Mike Davis's analysis of Trump's electoral victory adds more complexity to this narrative (2017).

Obama represented an invaluable ideological asset for his party. Against Republican tough guys he could add lustre to his own party's identity politics. This was particularly the case after the crisis, when Clinton's exceptionalism, based on the American unipolar moment, an expanding economy and New Democratic Party ideology, no longer appealed to voters. In fact, Colin Dueck was right to state that Obama's "civic patriotism" created a synthesis "between US nationalism and progressive ideals", something the Democratic Party had sought for quite a long time. The Democratic Party had found a charismatic gentleman, and Obama's nationalism reflected these characteristics. He never abandoned the idea of the American Dream (Dueck, 2015, pp. 30-1). The political-institutional element running through his ideological discourse was based on the original meaning of inclusiveness that characterized both the early stages of the US federal structure and American post-modern imperialism. Obama's narrative was in historical continuity with the cornerstones of American nationalism, not just because he admitted to being "a believer in American exceptionalism" – as I said he did not much endorse that view of America – but mainly because he heavily emphasized that

> there is something special about this nation, precisely because this is a nation that is heterogeneous and that is forced to constantly confront the fact that we're different. And yet somehow there are a set of core values and common beliefs that can bind us together as a single people (Obama, 2004b, min. 15.20 to 15.53).

This seemed a long way from both Bill Clinton's stress on American economic power and Palin and Trump's search for an American purity which is fading away under the pressure of inexorable demographic changes. In between the lines of his speeches, Obama recalled that adapting to diversity meant strength. His argument was that it is possible to fashion a synthesis of the experiences of different ethnic groups living under the same flag and the foundational principles of the American constitution (Taylor, 2016, p. 35). For instance, in an address to the G20 audience in Turkey he said,

> when I hear folks say that, well, maybe we should just admit the Christians but not the Muslims; when I hear political leaders suggesting that there would be a religious test for which a person who's fleeing from a war-torn country is

> admitted, when some of those folks themselves come from families who benefitted from protection when they were fleeing political persecution – that's shameful. That's not American. That's not who we are. We don't have religious tests to our compassion (Obama, 2015i).

As in other aspects of policy-making, Obama attempted to nestle his ideological discourse within an institutional framework which reflected foundational American values. This element was also caught by another observer, who stated that Obama's interpretation of America's messianic duty drew attention to the need for "perfect domestic institutions" which could be imitated by others (Holsti, 2016, p. 388). Of course, this also had a less romantic side in the perversion of institutionalization and legalization as instruments for making certain facets of American power more acceptable to critical audiences at home and abroad, as in the case of national security legislation and the use of drones. Obama was never ashamed about American international leadership. While many commentators stressed his acknowledgement of other countries' nationalisms in a notorious answer he gave to Edward Luce, they overlooked the second part of the answer, where he stated that Americans "should take pride", boasting that "if you think of our current situation, the United States remains the largest economy in the world. We have unmatched military capability" (Obama, 2009c). In the end, only a few noticed that the gentleman president was committed to the continuation of America's "global leadership". They overlooked the nuances that contradistinguished Obama from other presidents and which at the same time demonstrated how faithful to American exceptionalism he was (Barreto and O'Bryant, 2014, p. 212).

Some scholars have noted Obama's post-racial politics. The former senator from Illinois was a black individual whose age and identity detached him from the experiences of Jesse Jackson and Al Sharpton (Mead, 2010, p. 148; Menaldo, 2014, p. 206). Although black, he embodied a 21st century version of the pluriethnic prototype that was represented by white-European American citizens in the 18th and 19th centuries, and which became central to US national identity– although the long experience of racism that characterizes US history must not be forgotten. Obama was the ultimate representative of the melting pot, the American *par excellence*: born on a Pacific island which became American as the result of the very last phase of 19th century expansionism; son of an originally Irish mother from Kansas and a Kenyan

father who met each other at a Russian class; a grandchild of a man and a woman who began taking an active role in the army the day after the Pearl Harbour attacks.[50]

Beyond the romantic rhetoric, greatly amplified by the media, one can see a crucial juncture between Obama's attempt to market the message that, despite their diversity, Americans are part of the same great nation, and the shift to a new – or renewed – geo-identity for the United States in the 21st century – the Pacific identity. All things considered, and *pace* Palin, could anybody be more American than Obama?

> Obama was an American for the twenty-first century. […] He thus embodies both the old immigration from Europe that Crèvecoeur referred to and the new immigration from outside of Europe that is a feature of the twenty-first century (Pedersen, 2009, p. 2; Menaldo, 2014, p. 206).

This was true with regard to both Obama's personal characteristics and his political action. He embedded all this multifaceted diversity and frequently referred to the persistence of the idea of the melting pot of races at the roots of American society. Gerard Toal was among the scholars who were too kind about Obama and his alleged "pragmatism" (2009, pp. 389-396), but he made an interesting point when he stated that "he embodies a hybridity that seems to be at the vortex of globalization: multi-racial, multi-locational, multi-confessional and multi-national in extended family" (Toal, 2009, p. 382). Similarly, it has been argued that Obama represented the "first global president" (Sharma, 2011, p. 164). Although analysts who adopted Toal's perspective did so because they were sympathetic to Obama, continuity between earlier exceptionalism and Obama can be seen in their comments. He did not lack patriotism, or hide it, but he attempted to portray it as an actualization of early American nationalism based on ethnic diversity, as opposed to Bush's neo-conservatism (Pedersen, 2009, pp. 28, 30). While he did not renege on the path of American exceptionalism, he projected an ideology which proposed a version of nationalism for the 21st century – a century where the social fragmentation brought by demographic change and economic crisis threatens to destabilize the American social order – insisting that "out of many we are truly one" (Obama, 2008). One might argue that

[50]For more information about Obama's family see Railton (2011, pp. 156-7).

His remarks from the Edmund Pettus Bridge on the fiftieth anniversary of Bloody Sunday[51] highlighted all these key ideological elements:

> And yet, what could be more American than what happened in this place? What could more profoundly vindicate the idea of America than plain and humble people – unsung, the downtrodden, the dreamers not of high station, not born to wealth or privilege, not of one religious tradition but many, coming together to shape their country's course? (2015c).

Obama embedded a 21st century exceptionalism in an America where the legacy of 18th and 19th century pluriethnic experiences has become increasingly complex and evident. At the same time, it was a signal of profound issues, such as the demographic trend of rising numbers of immigrants and whites in decline. This numerical shift from European-Americans to Latinos and Asian-Americanswas mirrored by the geopolitical decline of Europe and the rise of East Asia, where China, the USA's most powerful competitor, lies. Obama understood and interpreted these changes in a special but still nationalist manner.

6.4 Obama's Wilsonianism: saving the International Liberal Order

In Chapter 5 it was argued that compromise between competing constituencies – conservatives and liberals at the *Harvard Law Review* and liberals and blacks in Chicago – was central to Obama's approach to politics. Similarly, in the previous section it was maintained that Obama's identity discourse relied on social inclusiveness. Obama's worldview was also coherent with this approach. This Wilsonianism appeared many times in Obama's public speeches even though it was particularly evident in some of his United Nations interventions and the Cairo speech. Obama's worldview was centred on three traditionally Wilsonian pillars. Firstly, 'power is no longer a zero-sum game'. According to Obama '[N]o balance of power among nations will hold' (Obama 2009f; 2009d). Secondly, he called free-market democracy and human rights 'the firmest foundation for human progress in

[51] On 7 March 1965, during the first of a series of anti-segregationist demonstrations in Alabama, unarmed Afro-American citizens faced a violent attack by police forces.

this century ... ideas and principles that are universal' (2016g; 2009d). Finally, he was convinced that the post-WWII 'international order ... brought about diplomatic cooperation between the world's major powers' (2009f; 2009d). Quoting John F. Kennedy he stated '[L]et us never negotiate out of fear, but let us never fear to negotiate." (2009b).

Obama's Wilsonianism was contiguous to his effort to reform Wall Street and launch Obamacare, and it was tangible in his concern that centrifugal forces could tear the International Liberal Order (ILO) apart.

Obama aimed at recovering that progressively inclusive, smoothly functioning global economy within which capitalism and the US thrived (NSS, 2010, p. 12). This could be seen in the initiationofG20 summits in 2008 and attempts to repair international financial institutions (Napolitano, 2011, pp. 314-8). The G20 was preferred to G8 for economic matters, while the latter remained an important forum for political coordination.[52] According to Richard Gowan,

> The Pittsburgh Summit marked a turning point in the G20's evolution. Immediately prior to the meeting, the White House issued a statement announcing that the G20 was now "the premier" global economic forum, eclipsing the G8 (2012, p. 173).

Equally, this was one of the principal reasons for the US to pursue a G2 strategy with China, but as the rationale for the TPP demonstrated, the US did not want China to be fully integrated into the world economy if it did not adjust to US-friendly rules – and similarly, the US and Europe still refuse to grant China free-market economy status.

Obama tried hard, as demonstrated by his intervention in the British referendum in a speech delivered at Westminster. That speech was not just a violation of British sovereignty, as Leave campaigners put it, but also represented an attempt to rescue a Wilsonian idea of the post-WWII global order. At a time when the US will be increasingly focused on problems arising in the Asia-Pacific region, geopolitical concerns in the Old Continent could become more troublesome in the absence of a strong ally, integrated within the region, through which Washington would be able to exert its influence at lower cost:

[52] For more on the economic multilateralism of the first Obama administration see Patrick (2010, pp. 4-13). On Obama and multilateralism in general see Jones (2010, pp. 63-77).

> The United States wants a strong United Kingdom as a partner. And the United Kingdom is at its best when it's helping to lead a strong Europe. [...] The architecture that our two countries helped build with the EU has provided the foundation for decades of relative peace and prosperity on that continent (Obama, 2016c).

In the *op-ed* that accompanied Obama's visit to Britain, the president explicitly highlighted the relation between military power and global growth: "the tens of thousands of Americans who rest in Europe's cemeteries are a silent testament to just how intertwined our prosperity and security truly are" (Obama, 2016d). This was echoed by the most internationalist American *intelligentsia*, such as the director of the Council on Foreign Relations (Haass, 2016). The same was true of Obama's appreciation of Italian Prime Minister Renzi's mild opposition to Brussels (Reuters, 2016). But Obama's quest for a return to a global Keynesianism was not appreciated in Brussels and Berlin, a fact which future historians might consider evidence of declining American power. Obama's enthusiasm for multilateralism fell short and "could not work without coherent and coordinated action by other governments" (Napolitano, 2011, p. 320).

On more than one occasion, Obama reproved the leaders of other countries for their mercantilism, particularly Germany and the EU. This brought him to clash with Angela Merkel. The latter did not want to allow "stimulus spending". She preferred to maintain "fiscal discipline" in the name of the "interests of one's own country" and pressed Obama to "rein in imbalances that would cause American indebtedness to grow sharply" (Kulish and Dempsey, 2009).[53]

Obama's administrations pursued this objective by asking that the exchange rate policies of other states adhere to G7, G20 and IMF rules, hoping that a shift away from competitive postures would increase domestic consumption (Department of Treasury, 2016, p. 7) – in the Afterword I argue that this is an element of continuity between Obama and Trump. In a report to Congress, the Treasury created a "Monitoring List", which commentators referred to as "naming-and-shaming", warning that

[53] A cable from Hillary Clinton's campaign showed how her husband was involved in getting Greece and Germany to come to a compromise, and especially in "nudging" Angela Merkel (Reuters, 2016).

> there are a number of advanced and emerging market economies with large external surpluses, including Germany, China, Korea, and Taiwan, that could bolster domestic demand and contribute both to stronger global growth and a more balanced global economy (p. 4; see p. 29).

This political posture was ultimately reflected in the most expansionary actions taken by the Federal Reserve. Its quantitative easing (QE) and the longest period of low interest rates in history –increased for the first time under either of Obama's administrations in 2015 – were less to help the 44th president of the US as Trump argued and more to keep the American and global economy going (see Labonte, 2016).

6.5.Post-Cold War US strategy towards Asia: Clinton's and Bush's approaches

The idea of a geostrategic 'pivot' as a clear-cut shift in US foreign policy can be misleading. The Pacific and China have 'long loomed large' in US foreign policy, with observers often overstating the 'mythic quality' of trans-Atlanticism (Agnew, 2012, p. 5; Hobsbawm, 1994, pp. 40–1; Stuart, 2012, pp. 204–5). This section, therefore, attempts to highlight the nuances that contradistinguish Obama's narrative of the 'pivot' compared to post-Cold War presidents such as Clinton and Bush.

Clinton's approach to Asia mirrored the general worldview of the president. Clinton believed that the US was stronger if it transformed enemies and unstable countries in free-market democracies. This logic was summarized in the phrase '[T]he successor to a doctrine of containment must be a strategy of enlargement' (Lake, 1993, p. 5). While NATO expanded in Europe, in Clinton's interpretation of *Wilsonianism-cum-primacy* economic interests prevailed as he brought to completion agreements such as NAFTA, the Uruguay Round of the GATT and the WTO.
This globalism was applied on a regional scale with the principle of 'open regionalism' (NSS, 1995, p. 20). In the Pacific, this equalled to a 'New Pacific Community', an integrated strategy that considered 'security requirements with economic realities and our concern for democracy and human rights' mutually reinforcing (NSS, 1995, p. 23). Clinton's 'strategy of enlargement' guided regional multilateralism and free trade as the president hosted the first Asia-Pacific Economic

Cooperation (APEC) Economic Leaders Meeting in 1993 (NSS, 1994, pp. 2–3). In one rare occasion, Clinton offered a romantic portrait of America's relation to the Pacific – 'we began our existence as a nation as a Pacific power' (Clinton, 1993) – and suggested that America's 'ties across the Pacific are no less important than those across the Atlantic' (NSS, 1994, p. 19). However, in his narrative Asia was not the priority. Contrarily to Obama, in every NSS from 1994 to 2000 the Pacific was portrayed as a region separate from Eurasia and South Asia.
Because of this globalist view, Clinton's narrative about China was one of 'broader engagement' that encompassed economic and security cooperation (NSS 1995, p. 24), particularly on trade barriers, human rights and nuclear weapons. A consequence of this approach was that 'Clinton never decided how much of a priority to make China' (Haass, 2000, p. 138) in terms of great power relations. Nonetheless, his final NSS (2000) warned that

> 'China's rise as a major power presents an array of potential challenges. Many of China's neighbours are closely monitoring China's growing defense expenditures and modernization of the People's Liberation Army (PLA). ... China's adherence to multilateral nonproliferation and arms control regimes, as well as increased military transparency, is of growing importance (NSS, 2000, p. 64).

Also Bush's approach could be inferred from the general worldview. He was an idealist leader with an unquestioned faith that 'good will prevail over evil' (Mazarr, 2003, p. 506).
Like his predecessor, Bush believed that America 'gains the most when democracy advances' (Bush, 1999). However, Bush's interpretation of US grand strategy sounded more nationally-informed than Clinton's one. He wanted to adopt '[A] distinctly American internationalism. ... Realism, in the service of American ideals' (Bush, 1999) rather than genuflecting to the interests of 'the international community' like Clinton (Rice 2000, 47). Bush manifested greater interest for Asia. He considered 'Europe and Asia … the world's strategic heartland… our greatest priority. Home of long-time allies, and looming rivals' (Bush, 1999). Like Clinton and unlike Obama, however, Bush did not offer a comprehensive narrative about the Asia-Pacific, but he hoped that one day America's relationship 'with free Pacific nations is as strong and united as our Atlantic Partnership'. Furthermore, he lamented that South Asia was 'overlooked in our strategic calculations' (Bush, 1999) – coherently, he lifted nuclear

sanctions on India and Pakistan.
But concerns with terrorism became the lenses that translated Bush's worldview in regional policy. The region was a field for the 'global struggle of civilization versus extremism' and for the opposition to the 'nexus between terrorism and weapons of mass destruction' (Rumsfeld, 2004).
Prior to Bush's election, China was 'a competitor, not a strategic partner' that needed to be 'unthreatened, but not unchecked' (Bush, 1999). It was still a 'potential threat' because it wanted to 'alter Asia's balance of power in its own favour' (Rice 2000, 56). However, after a US spy plane collided with a Chinese jet, Bush stated that '[W]e should not let this incident destabilize relations'. Asked about the 'balance that you think should be struck between our strategic interests and our economic interests in Asia', he answered that 'China ought to be a trading partner of ours' (Bush 2001). Ultimately, China was in between a trade partner to engage on 'weapons of mass destruction ... [and] ... [H]uman rights' (Bush, 2002) and a state that maintained 'old ways of thinking', sought spheres of influence, and had to behave like a 'responsible stakeholder' (NSS, 2006, p. 41).

This picture is helpful to demonstrate that arguments that declared the Bush administration as the creator of the 'pivot'(Silove, 2016) are wrong for several reasons. According to Silove, the shift to Asia began in 2001,when the "original idea" was developed, beginning with the drawing up of the first Defense Strategy Review (DSR), which uncovered that the gap between the USA and other states with regard to certain military technologies was narrowing, with China described as the main "concern" (2016, p. 54-5).[54] These concerns were later addressed in the Global Force Posture Review (GFPR), reflecting what Donald Rumsfeld told Silove in an interview about the intention to "shift the total numbers of forces to have less in Europe and more in Asia" (2016, p. 60). However, Silove then states that Bush's administrations kept the shift low profile, although she highlights Robert Zoellick's famous "responsible stakeholder" speech, describing it as the foundational document of the pivot (p. 63). In the final years of the Bush presidency, the Pentagon explained that the pace and scope of China's military build-up was already putting the regional military balance at risk (Department of Defence, 2006, p. 29). Silove does not say this, but it is

[54] For Bush's initial military rebalancing manoeuvres, see also Christensen, 2015; Cronin and Kaplan, 2012, p. 12 and Ali, 2012, pp. 3-9. For recent improvements to regional U.S. military forces under the Obama administrations, see the Senate hearing of USPACOM Admiral Locklear, 2015, pp. 22-9.

likely she would agree that the continuity of the "pivot" was guaranteed by the confirmation of Robert Gates at Secretary of Defense in the first Obama Administration (Ali, 2012, p. 19).

Firstly, the analysis is too focused on the perspective and actions of the military, and Chapter 7 demonstrates that hard power was just one of different facets of the 'pivot'. Secondly, and following from the first point, the risk in only looking at the military perspective is of getting trapped in the kind of logic that drives those working in this branch of bureaucracy. Because of their profession, the military have to be constantly aware of developing threats around the world, and so it is not surprising that they showed concern about Chinese military technology. In fact, there were suspicions about China's military in the late 1990s, even before what Silove describes as the initial idea of the "pivot". Bush's concern with Asia was a natural response suggested by the Pentagon to the changing status of China, in continuity with US command of the global commons and the kind of concerns about industrialized states revealed by Paul Wolfowitz at the beginning of the 1990s. In fact, China had been showing that it could challenge US military power since the 1990s.[55] The Pentagon was equally concerned about various scenarios concerning Russia, China and the Middle East, to the extent – as I showed in Chapter 4 – that Obama's attempt to disengage from the Euro-Mediterranean region was resisted.

Thirdly, the "pivot", or "rebalancing", became a public and official policy in the discourse of some notable members of Obama's administrations. For example, the first paragraph of the National Security Strategy 2015's chapter on the international order is dedicated to advancing the rebalancing and to China, something that had never happened before (National Security Strategy 2015, p. 24; Quadrennial Defense Review Report 2010, p. 7). This explicit political perspective, put forward by Obama more than anybody else, cannot be considered a "fanfare" (Silove, 2016, p. 67-9). Furthermore, even foreign economic policy arguments like those of Christensen which maintain that the TPP was started by Bush have to be treated with care, because

[55]There was certainly a change in Bush's second term, as demonstrated for instance by war simulations carried out to prepare to face China – which was developing armaments that could challenge US supremacy along the Chinese coast (Etzioni, 2013, pp. 38-9; Quadrennial Defense Review, 2006, p. 29). However, the first step in building Air-Sea Battle capabilities began when the Obama administration was already in place (p. 41).

Bush's version of the TPP was not only an embryonic project, but was also smaller in scope than what Obama attempted to enforce (Capling and Ravenhill, 2011, p. 558).

Fourthly, if there was a "pivot to Asia" in Bush's foreign policy, as Silove maintains, it was done with a lot of inconsistency. It makes no sense to speak of a shift to Asia when most material and ideological forces were committed to Europe and the Middle East. In Silove's account, the "original idea" of the shift arose even before the war in Afghanistan and Iraq started. How can one affirm that Bush started the "pivot", when he then launched two military invasions elsewhere? Even during Bush's second term, the shift was eventually balanced by the surge in Iraq in 2007, while Obama clearly stated that his political direction was to disinvest and reallocate resources.

6.6 The geography of Obama's worldview: pivoting to Asia

Reading carefully Obama's speeches, it became evident that his "mis-management" of crises in Europe and above all the Middle East was part of a coherent policy rather than incompetent inaction. The president spoke out unequivocally to the Arab world, over the last eight years, with regard to the kind of US role he envisioned. He told Israel that

> precisely because of our friendship, it's important that we tell the truth: the status quo is unsustainable, and Israel too must act boldly to advance a lasting peace. […] No peace can be imposed upon them – not by the United States; not by anybody else (Obama, 2011b).

Obama wanted the US to decrease its political commitment from the historical controversy. In the National Security Strategy of 2015, Obama explained that the US could not continue investing resources in maintaining the regional order. He sent the following message to Israel and the Gulf monarchies, asking them to take care of their own problems.

> Resolving these connected conflicts and enabling long-term stability in the region, requires more than the use and presence of American military forces.

> For one, it requires partners who can defend themselves. We are therefore investing in the ability of Israel, Jordan, and our Gulf partners to deter aggression […] (NSS, 2015, p. 26).[56]

For Obama it was in America's interest that these allies "built their capacity to defend themselves and their territory and to make sure that destabilising activities that Iran may be engaging in are checked" (2015f).
This is very helpful in explaining the triggering event of much debate on the lack of an Obama Doctrine. The conflict was an occasion for the US to stress once again the need for "burden sharing" within NATO, despite the fact "the campaign as a whole remained heavily dependent on the US to provide Intelligence, Surveillance and Reconnaissance (ISR)" (Hallams and Schreer, 2012, p. 323).
Obama's reaction to instability in Libya provided a blueprint for his posture towards later crises in North Africa, Middle East and Eastern Europe.

> President Obama was deeply wary of another military venture in a Muslim country. Most of his senior advisers were telling him to stay out. […] Her [Clinton] conviction would be critical in persuading Mr. Obama to join allies in bombing Colonel Qaddafi's forces. In fact, Mr. Obama's defence secretary, Robert M. Gates, would later say that in a "51-49" decision, it was Mrs. Clinton's support that put the ambivalent president over the line (Becker and Shane, 2016).

In the end, Clinton's concerns were not taken seriously by Obama: "the inattention was not just neglect. It was policy. The president was like, 'We are not looking to do another Iraq'" (Becker and Shane, 2016a).

Together with the controversial missed deadline of the "redline" on Syria, Libya was considered an evidence that the grand strategy of Obama's administrations was determined by historical events. But observers did not realize that the opposition of Obama and his aides to prolonged campaigns in Libya and Syria eventually represented a sign that the president had a logical understanding of the geopolitical scenario in the region. Obama's seemingly weak foreign policy in the Middle East and

[56]In an interview with Goldberg in 2016, Obama called it a "cold peace". This was statement reflected in the contents of Trump's speech during his first presidential visit to Saudi Arabia.

Eastern Europe was only the result of a rational attempt to disengage some American resources from those regions, something that was anathema to many bureaucrats.

For what concerns regional security, Obama believed that "everybody has got to step up and everybody has got to do better" (Obama 2016e). This mood was also confirmed by an official NATO statement:

> Allies whose current proportion of GDP spent on defense is below [2%] will: halt any decline in defense expenditure; aim to increase defense expenditure in real terms as GDP grows; aim to move towards the 2% guideline within a decade with a view to meeting their NATO Capability Targets and filling NATO's capability shortfalls (NATO, 2014).

The rise of ISIS certainly was an obstacle to Obama's plan, particularly as the president was surrounded by experts and officials who remained sensitive to the threat of terrorism. Obama himself admitted that the US was pulled "back in" (Goldberg, 2016), and Russia's actions in Eastern Europe and Syria also pulled towards that direction. But for Obama there was no "direct American national-security interest" in the Middle East (2016).

It was reported during an interview to the president that he "frequently reminds his staff that *terrorism* takes far fewer lives in America than handguns, car accidents and falls in *bathtubs* do" (2016). Although ISIS represented an obstacle to Obama's politics of disengagement from the Mediterranean basin, for the president it remained "a flash in a pan" rather than "an existential threat to the United States" (Goldberg, 2016). In all truth, Obama showed his lack of interest in military intervention in the Middle East since the beginning. He did not want to be trapped in the Middle Eastern minefield or spend political and financial capital exporting democracy. He stated that although combating aggressions against allies, fighting terrorism, ensuring the free flow of energy and restraining the development of new nuclear weapons

> are America's core interests is not to say that they are our only interests. We […] will continue to promote democracy and human rights and open markets […] But I also believe that we can rarely achieve these objectives through unilateral American action, particularly through military action (Obama, 2013c).

Meanwhile, if Bush was as idealist as to hope in regime change in Russia (Bush, 1999), Obama's position was very different. Certainly, he rejected Putin's 19th century-fashioned geopolitics when in Moscow he stated that great powers should "not show strength by dominating or demonizing other countries" (Obama, 2009e). However, he admitted that "the fact is that Ukraine, which is a non-NATO country, is going to be vulnerable to military domination by Russia no matter what we do", he said (Goldberg, 2016).

The views summarized so far in this section, signalled that Obama and some of his aides were conscious interpreters of the consequences brought about by the uneven geographical development of capitalism. As the most consequential National Security Adviser of Obama explained

> The policy [of the 'pivot'] was put in place at the outset of the administration. And when we came into office, as you would imagine, we went through an exercise asking ourselves where we were overinvested and where we were underinvested in the world, where we wanted to change the footprint in the face of the United States and the world (Rose, 2014; Donilon, 2013).

These words indicate an appreciation of structural developments in the global geopolitical system. Obama explained that

> As we end today's wars, I have directed my national security team to make our presence and mission in the Asia Pacific a top priority. As a result, reductions in U.S. defense spending will not – I repeat, will not – come at the expense of the Asia Pacific (Obama, 2011c).

However, Obama read these geopolitical events through both the lens of American nationalism and his multi-ethnic and multinational experience. Obama's auto-biographical view of the Pacific space emerged on his very first trip to East Asia. His perception of the Pacific space and his attempt to strengthen diplomatic relations with countries in the region, above all with Japan and India, were already palpable when he put forward his own personal life story even before addressing the Pacific identity of the USA.

> I am an American President who was born in Hawaii and lived in Indonesia as a boy. My sister Maya was born in Jakarta, and later married a Chinese-

> Canadian. My mother spent nearly a decade working in the villages of Southeast Asia, helping women buy a sewing machine or an education that might give them a foothold in the world economy. So the Pacific Rim has helped shape my view of the world (2009g).

Obama's geoideological understanding of these events contributed to his view of the future of American imperialism. In addition, he developed a discourse that was solidly anchored in a very traditional theme in the American nationalist narrative by acting against parts of a security establishment which remained geostrategically concerned with Middle East and Atlantic relationships (Burns and Jones, 2016). In his rhetorical innovation of American strategic culture, Obama put forward a discourse which did not focus on European alliances and the Middle East, as George W. Bush did; rather, he drew on the historical memories and current opportunities offered by the Asia-Pacific region in terms of business, security and culture. Thanks to the economic success of the Asian Tigers, China and India and the predicted emergence of a middle class of enormous dimensions, the Pacific Ocean assumed the status of a bulwark for economic prosperity in Obama's geoideological narrative, as it had been when the USA was in its 19th century continentalist phase. Jeffrey Goldberg reports that the president wanted to divert the geographical imperatives of American power to Asia.

> [He] did not come into office preoccupied by the Middle East. He is the first child of the Pacific to become president – born in Hawaii, raised there and, for four years, in Indonesia – and he is fixated on turning America's attention to Asia. For Obama, Asia represents the future (2016).

On the one hand, from the perspective of an orthodox interpretation of Marxism it is evident that Obama's ideological strategy reflected the influence of the economic base on the political superstructure. In fact, dominating the Asia-Pacific region will guarantee the US access to the widest and most dynamic economic region in the world, along with abundant and as yet unexplored resources. On the other hand, one might argue that Obama's choice with regard to American nationalism was not only the consequence of the uneven geographical development of capitalism. Rather, it makes sense to argue that he showed deep sensitivity: firstly, because he was faster than others to react to the changes taking place in the Asia-Pacific region; and secondly, because he constructed a discourse with a unique and personalized style that

requires any analysis to go beyond the mere base-superstructure paradigm. In Obama's nationalist narrative, economic forces intersected with a certain idea of the Asia-Pacific region, but also with a certain geopolitical view which prioritized the region and its issues over other parts of the world. It is therefore worth asking whether the ideology of the "pivot to Asia" was the result of a hegemonic project of elites, as a Gramscian scholar would say. Alternatively, was this Obama's geostrategic interpretation of the post-2008 world order, arrived at under the influence of his personal experience and knowledge of the region, or was it due to his need to undermine China's power while avoiding the use of confrontational language?

It is difficult to determine which of these elements is most representative. While I respect the kind of analysis that Gramscians, post-structuralists, constructivists and students of critical geopolitics might provide, in this instance I am also inclined to believe that Obama's assessment of the global strategic balance helped the president frame his policy. Surely, if a threat like China had not been rising in the Asia-Pacific region, the emphasis on America's Pacific identity would have been weaker. However, this does not imply that Obama's narrative can be portrayed as merely an attempt by elites to provide their citizens with a nationalist story to help them forget about the maladies of capitalism and a corrupted political class. The main reason for arguing this is that references to Asian-American and Pacific identity sounded as if they were part of a handcrafted, original discourse that existed mainly in Obama's mind. For better or worse – and this is not a defence of Obama – his comments did not seem constructed. A demonstration of this is that while it is likely that Obama's narration may serve the purposes of US imperialism in the Asia-Pacific region, not many noticed this discourse, while not everyone agrees that so much emphasis should be put on the "pivot".[57]

My argument is contested by those who want to downplay the idea of the "pivot to Asia" from an ontological point of view, asking if this strategy even existed. In what I consider the third kind of argument about the "pivot" – the first being about its weakness and the second being the assertion that it was born with Bush – John Agnew maintains that the shift was not really a shift, but an elite construction to serve domestic interests. Firstly, Agnew puts the "pivot" in historical perspective,

[57]Obama was certainly helped by Hillary Clinton, who used romantic language to highlight how the USA "has always been a Pacific power", due to its "great blessing of geography" (2011).

concluding that in the past the US has frequently intervened militarily outside Europe. The concept of the "pivot" assumes "that during the Cold War US governments had a singular focus on Europe. This was by no means the case […] The US alliances with Japan and South Korea suggest that China has long loomed large in US foreign and military policy" (2012, p. 5). Agnew found one reason for this unjustified enthusiasm and exaggeration in the overstatement of Atlanticism and the strong relationship between the USA and Europe based on intersecting economic, geopolitical and cultural affinity, noting that there was

> an idealization of a supposedly "united" trans-Atlantic world suddenly challenged by a rift as the US gaze moves elsewhere. Even before the Bush Administration essentially abandoned any sort of multilateral geopolitical strategy based in the North Atlantic Alliance in relation to global terrorist networks, the trans-Atlantic alliance had taken on a mythic quality (2012, p. 5).

I do not disagree with Agnew, although it seems reductive to consider the "pivot" to be merely a story for the domestic media and voters.
With regard to Agnew's argument about Asia's place in US grand strategy, it was not only after WWII that the US aspired to be a global power in the footsteps of imperial Britain. There were other points at which the US pivoted towards Asia: one when a debate culminated in the conquest of Hawaii and the occupation of the Philippines before the turn of 20th century and another at the end of WWII, when although Atlantic priorities won the debate, the San Francisco system of bilateral and trilateral defence treaties emerged (Stuart, 2012, pp. 204-5)., the USA was dragged into the Pacific even before the end of WWII by Japan's attempt to form a "Great East Asian Co-Prosperity Sphere". Eric Hobsbawm stated that the USA considered this event "intolerable" (1995, p. 40) and that "US public opinion regarded the Pacific (unlike Europe) as a normal field for US action, rather like Latin America. American 'isolationism' merely wanted to keep out of Europe" (p. 41). According to Hobsbawm, therefore, if the US chose to fight Germany first, it was because Roosevelt calculated that it was a greater threat to both American and European interests (ibid.). However, this does not mean that one should not appreciate the elements of novelty in the 21stcentury "pivot to Asia". Against imperial Japan, the political discourse was dominated by the clash between forces of good and evil but also racial discourses (Dower, 1986). During the Cold War, communism was fought ideologically by

attempting to spread American universal values that directly underpinned capitalist reproduction. During the Cold War, North Korea and Vietnam were a threat to US-led global capitalism but external to it, and in the end the USA accepted. In contrast, today China is an internal threat to the US-sponsored global order, which adds emphasis and meaning to Obama's "pivot to Asia" and raises the importance of China compared to the USSR. Considering China's economic and military strength and its role in the world economy, it is clear that the implications of China's rise are much more structural than those of expansionist imperial Japan, the USSR and the regimes in Korea and Vietnam, while pre-1970s China was not a vital threat to the USA in the way it is today.

With regard to Atlanticism, Agnew's critique is too focused on the controversial Bush years, when the first signs of crisis emerged in the trans-Atlantic alliances, starting with the war in Iraq and continuing with the problems of global governance and uneven development discussed in Chapter 1.Ultimately, Brexit and Obama's failed diplomatic intervention were blows to the unity of the trans-Atlantic capitalist integration project which was central to Wilson's worldview. But Atlanticist institutions like NATO were less contested before the economic crisis. Obama's discourse stressed the importance of Asian ties for his country from several points of view – from the expansionism of settlers to the "pivot" through WWII history and cross-continental migratory flows. This is how he addressed an audience in Tokyo.

> While our commitment to this region begins in Japan, it doesn't end here. The United States of America may have started as a series of ports and cities along the Atlantic Ocean, but for generations we have also been a nation of the Pacific. Asia and the United States are not separated by this great ocean; we are bound by it. We are bound by our past – by the Asian immigrants who helped build America, and the generations of Americans in uniform who served and sacrificed to keep this region secure and free. We are bound by our shared prosperity – by the trade and commerce upon which millions of jobs and families depend. And we are bound by our people – by the Asian Americans who enrich every segment of American life, and all the people whose lives, like our countries, are interwoven (2009g).

Again, this shows that Agnew was right to highlight that America has always been concerned with the Pacific, but Obama's narrative helps to rediscover ties that go back as far as 19th century continentalism. Agnew's critique is very much influenced by critical geopolitics, which is why he is suspicious not only of the "pivot" as a policy but also of the policy's object, the Pacific region, which emerges from US foreign policy discourse as a geographical construction:

> The term Asia-Pacific seems to serve primarily to anchor the United States in Asia by using the trans-Pacific connection in a manner similar to how the trans-Atlantic links the US to Europe. Asia-Pacific is not a term with much academic tradition behind it. It seems to derive from usage in APEC (Asia-Pacific Economic Community) and the US Pacific Command's usage in the title of its center for security studies in Honolulu (Agnew, 2012, p. 8).

Agnew's doubts about the "pivot" depend on his belief that ruling elites design misrepresentations of space in order to serve imperialist projects. Although this is a fair position to take – his point about APEC describes well the attempt of US and its Western allies such as Canada, Australia and New Zealand to be granted access to regional governance – I think this perspective is able to coexist with what I am arguing about Obama's approach to the Asia-Pacific region, which was also a way for the former president to push back the Pentagon's aggressive stance and make diplomacy for the Trans-Pacific Partnership work. The geoeconomic importance of the Asia-Pacific region was increased by a cultural, historical and strategic assessment of that space, and in particular by how Obama created a synthesis of 21st century Pacific and American nationalism. The existence of a new representation of the Pacific beyond the elite level is shown not only by the autonomy with which Obama's argument developed, but also by the existence of debates outside politics. The authors of an article in *The Los Angeles Times* complained about the ideological stances of some Republican and Democrat politicians in California who opposed the TPP, drawing attention to how it has been historically beneficial for the US, and particularly for California – the state that most energetically drives the national economy – to keep the door to the Pacific open.

> [I]f the rest of the country suffers from these growing isolationist tendencies, California has even more to lose. For half a millennium, ever since the first

> explorers and missionaries reached these shores, the Pacific has provided us access to other cultures and profitable commercial relationships (Schnur, 2015).

Crucial to this point are the demographic changes taking place in the USA, which from a Californian perspective are rapidly shaping American identity and will continue to do so with a certain pace.

> This is a state in which Latinos have become the largest ethnic and racial group and in which Asian Americans now represent the fastest-growing immigrant communities. Yet our politicians lead the charge against a trade agreement that would strengthen relationships with the countries whose émigrés now represent our identity and our future (ibid.).[58]

Gerard Toal seems to agree with my representation of Obama's exceptionalism. Although he was too kind to Obama, he stated that the president pushed "the limits of the American creed" (Toal, 2009, p. 382). To me, this means that Obama was a premature accident in a transitional historical phase for America's economy, demography, identity and international relations, about which part of the elites were unhappy and for which part of American society was not entirely ready, as demonstrated by the geographical divide between inner and coastal America seen in the 2016 election. Obama's geographical exceptionalism lay in continuity with a historical narrative on the Pacific Ocean as the frontier of economic prosperity. In particular, this recalls Frederick J. Turner's endorsement of the following words by James Bryce: "the West has been a constructive force of the highest significance in our life" and was "the true point of view" in the history of America and "the most American part of America" (quoted in Turner as James (probably) Bryce, 1947, pp. 206, 205). In addition, despite his non-objective account of American expansionism, Turner foresaw the rise of a region which would become ever more important: "look at my wealth! See these solid mountains of salt and iron, of lead, copper, silver, and gold. See these magnificent cities scattered broadcast to the Pacific!" (1947, pp. 213-4; 296-7).

Obama did not place himself in exact continuity with that tradition, which was flawed by its natural determinism; his style was decades away from that kind of rhetoric, and

[58]At the same time, confirmation of Schnur's picture was provided by a survey revealing that Americans consider Asia to be more important than Europe (Dempsey, 2011).

he did not even go as far as developing a Pacific version of the Monroe Doctrine, as President Millard Fillmore had for instance.[59] However, he arrived at a discourse similar to that of Turner by interpreting various experiences and anchoring his observations in a classical understanding of Americanness, even if many observers thought Obama was not a nationalist president, as I discussed in Chapter 4. The rapid changes in the Asia-Pacific geoeconomy matched those in American society and the election of a multicultural Pacific president. This provided continuity with Turner's argument, but in a new language adapted to a personality that could reflect these changes on the diplomatic agenda better than any other in 21st century America. Obama's views emerged in a very different fashion compared to those of previous American presidents, particularly for what concerns China. As he shifted to the Asia-Pacific, Obama did not look for new or "modified old monsters to be fought" (Ó Tuathail, 1998, 171), nor did he resort to the rhetorical device of "otherness" (Dalby 1990). His narrative was not explicitly hostile towards China, and the few times when it was, it was due to a clear interest in defending trade rules which favored the US economy. In Obama's discourse, one cannot find that "difference is a threat" (Dalby 1990, 171). Obama's geostrategic logic was mostly veiled behind a romantic portrait of geoeconomic stakes in the Asia-Pacific region rather than being framed through "security discourses" (Dalby 1990, 11). For this reason, it is factually wrong to argue that under Obama, China was still the 'savagery against which [the US must] distinguish itself' (Turner 2016, 936). When Obama and others commented on China's state capitalism, they related it to increasing competition with American companies. Therefore, while there is an inside/outside dimension to every state leader's narrative, Obama's personal views on the solution to the contradictions of American grand strategy drew more on inclusiveness than 'otherness' – despite that inclusiveness being made in America's image.

As former US State Department official Stephen Harner put it, Obama dug out the "19th century ethos" of Manifest Destiny and re-fashioned it in 21st century terms (2014). This emerged with the most powerful eloquence when he addressed the Australian parliament on one of his many trips to Asia and the Pacific, explaining that the US is largely a Pacific nation, remaining close to the other Western nations located

[59]Fillimore not only opened up the market with isolated China and Japan in a way that favoured US commercial ships, but also *de facto* ordered Napoleon III to renounce to his intention to occupy Hawaii.

there. He anchored this claim to symbols embedded in the territory which form the highway linking modern American history to countries on the opposite shore of the ocean:

> Asian immigrants helped build America, and millions of American families, including my own, cherish our ties to this region. From the bombing of Darwin to the liberation of Pacific islands, from the rice paddies of Southeast Asia to a cold Korean Peninsula, generations of Americans have served here, and died here – so democracies could take root; so economic miracles could lift hundreds of millions to prosperity. Americans have bled with you for this progress, and we will not allow it – we will never allow it to be reversed (Obama, 2011).

The spirit of statements like this is in accordance with the numerous statements about the role of Asians in US society, such Japanese-Americans in WWII (Lange, 2016). Similarly, the anniversary of Pearl Harbor and the visit of Shinzo Abe towards the end of Obama's mandate had an important resonance. While many either attacked or praised Obama for keeping his political action devoid of any unnecessary parochialism, he acted as a true nationalist by evoking the past in order to make a historical-geographical case for an American geopolitics of the Pacific: "our new focus on this region reflects a fundamental truth – the United States has been, and always will be, a Pacific nation" (2011). This discourse on identity was also reflected in Obama's intense diplomatic work in the Asia-Pacific region, mainly with regard to Japan and India, as discussed above, but as previously mentioned it also involved Australia. Obama's speech to the Indian Parliament highlighted the continuity between his nationalism's (multicultural) politics and its geography, as he drew on the multi-ethnic character of the USA and on how similar this was to Indian society:

> Look at our countries – the incredible diversity even here in this hall. India is defined by countless languages and dialects, and every color and caste and creed, gender and orientation. And likewise, in America, we're black and white, and Latino and Asian, and Indian-American, and Native American (2015b).

A "Pacific Islander" president was best able to estimate the value of the Asia-Pacific region for the progress of American history in economic and military as well as

cultural terms. This is probably how Howard Fineman's poetic comment should be read: "the former teenage body-surfer of the Pacific is comfortable in the territory where the history of this century is being written" (2014). Fineman wanted to highlight that Obama was one of the best qualified to translate into policy the structural, tectonic changes of the global relations of space and power and the implications of American proximity to the Asia-Pacific region at a specific historical junction. Obama, together with a few others, realized that at this time of change, the Pacific was the right place to turn to in order to sweep away the "maladies" of 21st century America and strengthen US regional influence through a framework of military, economic, diplomatic and ideological power (Turner, 1947, p. 304). Although the Pacificism in Obama's message remained largely overlooked, one could go as far as to argue that the Pacific had the same place in the Obama Doctrine that the Middle East had had in the doctrines of every president since WWII:

> Our enduring interests in the region demand our enduring presence in the region. The United States is a Pacific power, and we are here to stay […] So let there be no doubt: In the Asia Pacific in the 21st century, the United States of America is all in (2011c).

It must be admitted that Obama hid a concern that Australia might be lost to China behind such interventions, given that the Chinese economy has become increasingly important to Canberra. Furthermore, Australia's economic security is not only an issue for the Commonwealth member itself, but also affects the Philippines, particularly since Duterte became president. In this sense, Hillary Clinton reassured an Australian journalist by affirming that "we want Australia as well as other nations to know that the United States is not ceding the Pacific to anyone" (Clinton, 2009). Clinton's promise to Australia and Obama's fascinating narrative are likely to be unravelled by Trump's cynical rhetoric, which only confirms that different American administrations will always adopt their own plans, styles and tactics to accomplish the overall goal of grand strategy. With regard to US-China relations, Trump's hostile attitude may compound the consequences of sudden regional events.

Conclusion

Summarizing Obama's approach to US foreign policy in the Middle East, Zaki Laïdi wrote that Obama's foreign policy was guided by three principles with respect to the turmoil in Middle East: support for peaceful demonstrations and condemnation of violent repression; double standards depending on US interests in the particular country; and a directly proportional relation between the intensity of the intervention and the existence of a credible alternative in any given country (2012, p. 117). Regardless of the exactness of Laïdi's comment, his view highlights Obama's attempt to compromise between Wilsonian idealism and geostrategic pragmatism. As the theoretical chapters have tried to demonstrate, the global political economy and the foreign policies of states experience a constant, inner tension which is produced by the collaborative but also difficult co-existence of economic and political (geopolitical, cultural, electoral, domestic, etc.) interests. In Chapter 3, the structural contradiction that arises from the endemic unity of opposites central to US grand strategy was uncovered. For this reason, it was argued that it is up to different US administrations to design solutions that can square the impossible equation of *Wilsonianism-cum-primacy*. Each president and inner circle of foreign policy experts will try to do so relying on their worldviews, on their appreciation of the national geopolitical tradition, on the potential of their country and on their understanding of the world order.

The aim of this chapter was to place an illustration of Obama's worldview within this more abstract framework. Contrarily to those who maintained that Obama, for the better or worse, did not have a clear grand strategy and narrative, the president demonstrated to have a coherent understanding of American global strategy. Like other presidents he was keen on striking a balance between globalism and US nationalism, a strategic interest that brought him to direct the focus of American geopolitics towards the Asia-Pacific. However, the way he interpreted the foundational principles of US grand strategy was driven by a synthesis between an American-informed globalism and authobiographical experiences. Domestically, he addressed journalists and crowds by stressing that America's society was constituted by a pluriverse of ethnic groups and interests which found expression in an inclusive, flexible and democratic institutional system. Despite the principle of *e pluribus unum* was undermined in American history by racism, slavery and the brutal exploitation of workers in 19th and 20th century, the United

States in the 21st century is still characterized by a high degree of demographic diversity that was tangible in the early US society. Obama was a skilled observer of this America also thanks to his personal history. By virtue of being a black with Pacific origins, in many ways he was a bridge between early and contemporary America, and he was part of that demographic revolution that is currently driven by Asians – the fastest growing group – and Latinos – the most numerous.
If America's demography is the signal of a changing world order – where Asians will also dominate numerically – it is even more so the incredibly fast emergence of some Indo-Pacific states as rich and powerful.
Obama did not develop a classical realist narrative that found new monsters, as critical geopolitics scholarships maintains. Instead, he constructed a liturgy of the Pacific which found a synthesis between his personal experiences and imagery of the Pacific Ocean with a nationalist mythology of that space and its importance to the reproduction of American society. Coherently with this view, Obama attempted to keep at the top of the agenda economic, geostrategic and diplomatic issues concerning the Asia-Pacific. The latter, for Obama, deserved more attention compared to unsolvable and less important issues in Eastern Europe and the Middle East.
This analysis, which relied on an independent observation of Obama's speeches, was developed to counter the abundant academic and journalistic literature on the lack of Obama's grand strategy and doctrine. A very important factor that caused such reactions was the lack of a coherent and solid intervention during and after the Arab Spring, particularly in Libya and Syria. But as this chapter has highlighted, the president was always opposed to military adventures in the Middle East, while he wished to decrease troops from Europe. As many realists have argued, the United States after 2008 is increasingly shifting towards an off-shore balancing. Certainly, this is crystal-clear in Obama's geopolitical worldview.

The themes of this chapter were essential to this thesis in two ways.
On the one hand they helped vindicate the claims put forward in Chapter 3 about strategic culture. On the other hand, this discussion is useful for exploring the final part of the case-study. Knowing Obama's ideas, it allows a better appreciation of why the 'pivot to Asia' was developed as a comprehensive strategy that engaged with China through a 'carrot and stick' approach – that some realists call hedging.
Contrarily to Trump's assertive economic diplomacy and suprematist nationalism,

Obama provided a finer attempt that vindicates America's interests and seeks to overcome the structural limits of US grand strategy. As the next chapter will show, this equalled to a three-pronged strategy that covered military, economic and diplomatic policies.

If China is the structural catch-22 produced by America's grand strategy after WWII, Obama contrasted China in a non-confrontational manner, exerting military pressure in the Eastern and Southern flanks of China, but integrating this effort with far-reaching economic and diplomatic actions.

Chapter 7

Obama's grand strategy: the "pivot to Asia" between globalism and dominance

Introduction

In the previous three chapters, this thesis sought to vindicate the organization of the three theoretical chapters. These, in fact, offered a discussion on the systemic, the societal and the idiosyncratic – ideological – spheres of power. The aim of such a comprehensive organization of the thesis was to offer an account of both structure and agency during Obama's presidential mandate. Chapter 4 concluded by describing a systemic global geoeconomic shift from Europe and Middle East to Asia and highlighting how increasingly crucial is for the United States the Chinese question. Chapter 5 and Chapter 6, instead, offered a profile of Obama's worldview both as candidate and as commander in chief. Chapter 5 was more focused on Obama's social background, his view of America's societal system, and his relationship with both economic and security establishment, and it concluded that Obama was as alternative to mainstream politics as he could be. Chapter 6 instead, focused on Obama's political and geopolitical worldview with particular attention to the changing demography and geopolitical imperative of the US.
The tread that tie these chapters together – and that becomes more evident in this final chapter – is the tension between different logics of power analyzed in Chapter 3 but which is present in the other chapters of the theoretical framework.

The chapter that is about to begin, therefore, has two tasks. On the one hand, it offers a comprehensive account of Obama's rebalancing towards Asia by exploring the making of the pivot and its economic and diplomatic policies. Most literature on US-China relations in recent years has adopted a realist perspective – with a heavy interest in structural military factors (Brooks and Wohlforth, 2016; Cunningham, F. S. and Fravel, 2015; Glaser, 2015; Goldstein, 2013; Chong and Hall, 2015; Friedberg, 2005; Rosecrance and Miller, 2014).[60]
On the other hand, this chapter offers an account of the "pivot" that reflects the structural tension of American grand strategy. This is particularly evident in Obama's attempt to deal effectively with China's assertive foreign policy while avoiding to jeopardizing the equilibrium of both US-China relations and the global order.

[60]Eventually, MacMillan's historical comparison with the causes of the Great War showed more analytical depth (2013).

The US is trapped inside its role as the "status quo" power. Obama's approach was to react proportionally to China's challenging posture while maintaining an uneasy peace in a region which is central to both American hegemony.

The chapter is divided in several sections. Section **7.1** begins with an account of Obama's approach towards Russia and Iran. This section is not directly concerned with US foreign policy towards the Asia-Pacific. However, it shows how Obama's Wilsonianism coupled by geostrategic pragmatism informed the president's resolution of some regional scenarios – in order to concentrate US efforts on Asia. On the one hand, he hoped that he could normalize relations with Russia by allowing Moscow its own sphere of influence. On the other hand, he was seriously committed to a successful outcome in the negotiations for a nuclear deal with Iran. Section **7.2** focuses on the level of policy-making and describes the Obama's administration's difficulty in planning a coherent strategy against China. Drawing on the concept of *Wilsonianism-cum-primacy*, this section seeks to show the tension between cooperation with and containment of Beijing. Section **7.3** mirrors the same kind of difficulty but at a military level. At the same time it describes how the Pentagon was influential in deploying armaments according to the Air-Sea Battle design. Sections **7.4** and **7.5** are very important for what concerns how the structural tension of American grand strategy was resolved by Obama. This can be seen in two trade agreements that Obama's administrations have sought to construct. On the one hand, the Bilateral Investment Treaty (BIT) aimed at opening the US' China's markets to each others' companies. The Trans-Pacific Partnership instead, excluded China from the biggest trading area in the world. Despite the fact that BIT offered a win-win deal to China and the TPP was driven by a leave or take approach, both agreements had one objective. The BIT and the TPP aimed at undermining China's state-capitalism and bringing free-market discipline to Beijing. For what concerns the theoretical claims of this thesis, the TPP – but also the BIT – is a contemporary example of how the capitalist-imperialist state is constrained by the interests of the ruling class and how the state uses certain pressures to carve out more political and economic power over rival states. Because China's state capitalism model is the real source of Beijing's geopolitical power, it made sense for the US to try to sabotage it. This was the most refined attempt of Obama's administrations to strike a balance between a global geoeconomic openness and US geopolitical primacy.

Section **7.6** illustrates Obama's diplomatic strategy in Asia-Pacific. This section not only reminds, once again, that multilateralism was central to the way Obama translated the general principles of US grand strategy. It confirmed the importance of the Asia-Pacific in Obama's worldview and of building or reinforcing new or existing military alliances with an anti-China logic. This chapter focuses mainly on Obama's diplomatic flirting with Japan and India.

Ultimately, this chapter demonstrates that US foreign policy towards China is driven by an inter-imperialist logic, even though the interdependence between the two powers makes this rivalry even more intricate. Furthermore, the chapter confirms that while the systemic and societal spheres only allow state elites a very limited freedom of manoeuvre in foreign policy, presidents maintain some decisional power in the way they operationalize American grand strategy.

7.1 Diplomacy of the rebalancing 1: settling relations with Iran and Russia

Obama's diplomatic action offers two important insights that confirm one of the arguments advanced in Chapter 6. Obama was a Wilsonian informed by geostrategic pragmatism. In that sense, his effort to pacify relations with Iran and Russia in the aftermath of the Bush presidency, highlighted two themes that characterize both ideological strands of Obama's worldviews. On the one hand, the fact that he wanted to pacify relations with Iran and Russia was evidence of Obama's faith in diplomatic action and strategic engagement. His diplomacy was coherent with the attempt to strengthen the International Liberal Order. On the other hand, establishing normal relations with these two rivals was a way for Obama to stabilize two important regional scenarios in Eastern Europe and the Middle East. Ultimately, there were two main benefits to this logic. Firstly, normal relations with Russia and Iran were the prologue to a smoothly functioning world order. This equalled to cancelling sanctions against Teheran and eventually avoiding sanctions against Russia. International businesses would have largely benefited from this. European allies such as Germany and Italy, among others, have very important trade partners in Moscow and Teheran.
Secondly, such a plan went hand in hand with Obama's geostrategic pragmatism and the 'pivot to Asia'. Rebalancing the geopolitical focus to the Asia-Pacific required a more stable situation across the Atlantic.

Coherently with what stated in Chapter 6 about Obama's views of the Middle East, the president engaged Iran with the aim of seeking a regional 'cold peace' (Obama, in Goldberg 2016). Defending the Nuclear Deal (14 July 2015), Obama explained that this served both economic and geopolitical logics. Without a deal "we would have to sanction, for example, some of the world's largest banks. We'd have to cut off countries like China from the American financial system". This was a solution that favoured US allies but that could still control "Iran's destabilizing activities". Furthermore, Obama explained that "our closest allies in Europe, or in Asia -- much

less China or Russia -- certainly are not going to agree to enforce existing sanctions for another 5, 10, 15 years according to the dictates of the U.S. Congress". Obama was wise when he stated that not reaching an agreement "it would spark an arms race in the world's most unstable region, and turn every crisis into a potential nuclear showdown" (Obama, 2015g). As Susan Rice explained, the deal with Iran was not about US-Iran relations but rather it was "simply to make a dangerous country substantially less dangerous" (Goldberg 2016).

With Russia instead, Obama also sought a "reset" of US-Russia relations as he sent Hillary Clinton to meet Sergei Lavrov in Moscow where she handed him a control box with a red button. The specific aim was to increase cooperation on the financial crisis, the New START treaty, Afghanistan, Iran, UN Security Council Resolution 1929 – with Russia cancelling a contract with Teheran for air-defence systems – and Russian membership of the WTO (Stent, 2012, pp. 126-7). The reset was controversial as it meant putting aside previous commitments made by the Bush administration to the governments in Warsaw and Prague (Feith and Cropsey, 2012). While disagreement remained over how to redesign Atlantic-European security after the 2008 war in Georgia, this Russia policy made sense for the Obama administration's grand strategy in two ways.

If the Nuclear Deal was undermined by Trump, the "reset" did not last for two main reasons, among others. One was Russia's involvement in Syria driven by both domestic concerns with Islam and geostrategic calculations as Syria provides Russia with its only naval base in the Mediterranean (Stent, 2012, p. 127); the other, it was the Russian annexation of Crimea. This triggered important questions in Washington, D.C. Should the Eastern European front be prioritized over the Middle Eastern one? Was Russia's assertive geopolitics a serious threat to the European order, and if so was it a threat to American interests? In contrast to the trend seen during the two Bush administrations, it seemed that Russian moves in Eastern Europe were causing more concern in Warsaw and Berlin than at the White House (Rachman, 2016). In the Eastern European front – more than in Iran – Obama had to face internal opposition. His first National Security Adviser, James L. Jones, who was a retired Marine Corps general, and former ambassador R. Nicholas Burns represented the faction that advocated for establishing a permanent force in Eastern Europe under the aegis of a US-led NATO with more material resources and a bold political mandate

(Burns and Jones, 2016).[61] Obama hoped that this would be unnecessary, but in the end he had to change his mind and increase the allocation of defence funds to Europe (Landler and Cooper, 2016).

Although the US was rebalancing towards Asia, it responded promptly to Russia's assertive posture during the Crimean crisis. In the following months, Washington, D.C. sent a clear signal to Russia by deploying troops and weapons in the Baltic region and moving F-22 fighter aircraft and a ground-based missile system to the Romanian coast (Ward, Mortensen and Platt, 2016; Browne, 2016). This reaction demonstrated that while Obama was pushing hard for the rebalancing, he could not entirely overlook the Eastern European front – also because of internal pressures.

In Syria, however, the Obama's approach "won". If one faction wanted to escalate the US commitment to the Syrian crisis by providing "moderate Syrian rebel factions with more anti-tank missiles and grenade launchers through third countries", Obama and his last National Security Adviser Susan Rice vetoed this request (Landay and Stewart, 2016). At the end of June 2016, Obama sent Russia a proposal for joint air force operations in Syria against Jabhat al-Nusra – the local al-Qaeda branch – in exchange for Russia pressuring Assad not to bomb rebel groups which the US did not consider terrorist – but disappointment at Obama's proposal was shown at the highest bureaucratic level by Secretary of Defense Ash Carter (Rogin, 2016).

[61] On Jones' vision for NATO see Cohen and Jones (2014).

7.2. Cooperation or containment? The cautious hedging in Obama's China policy

Obama's 'pivot to Asia' and more in particular his approach towards China, was informed more than any other president by Robert Zoellick's phrase that asked China to develop as a "responsible stakeholder". This speech encapsulated well the tension endemic to American grand strategy that was illustrated in this work and that Obama, particularly in his second mandate, attempted to resolve. The speech

> struck a balance between the pragmatic engagement position traditionally advocated by the State Department and the security threat or hedging perspective represented by the Defense Department, but it left the inherent contradictions this created unaddressed (Garrison and Wall, 2016, p. 51).

Similarly, the main divide within the American government at the time of Obama was between those who favoured competition and those who wanted to cooperate with Beijing (Indyk *et al.*, 2012, p. 30; Hurst, 2014, p. 98; Etzioni, 2013, p. 44). Initially, the president adopted the second approach, with the aim of creating conditions that could help China to emerge as a stabilizing rather than a disruptive force (Etzioni, 2013, p. 44; NSS, 2015, p. 24). Obama's cooperative strategy was reflected in his call for a US-China G2 to tackle the global financial crisis, nuclear proliferation and climate change. *De facto*, the first Obama Administration tried to continue the path of amicable diplomatic relations achieved during Bush's presidency. The president was persuaded by the appeal for a global diarchy from Jimmy Carter's former National Security Adviser Zbigniew Brzezinski (Brzezinski, 2009). However, Brzezinski was still too influenced by memories of his successful diplomatic action to consolidate the alliance between Washington and Beijing in the final phase of the Cold War, and he did not realize that post-2008 China assumed a revisionist posture. While this was a "promising start", China's growing assertiveness made cooperation utopic (Sanger, 2012, p. 377; Indyk, 2012, pp. 30-8; Drezner, 2011, pp. 64-66). In fact, over the years rising tensions became accepted as normal within the government, particularly after 2015 when China became more assertive on cyber security, sanctions against North

Korea, the South China Sea, regional diplomacy and human rights (Sutter, 2016).[62] – but also with regard to Libya and Syria. The initial spirit of cooperation which marked G2 discussions was short-lived, as former Chinese Premier Wen Jiabao found it inappropriate for a powerful country like China (2009). The failure of Obama's G2 approach to China was evident from the early days of his presidency and was also mirrored in the sackings of James Steinberg, James Bader and Jon Huntsman. These experts in the international politics of Asia and advisors to Obama had to leave because China's aggressive posture defeated their proposal for "strategic reassurance" as the guiding principle for US diplomacy with China (Rogin, 2009; Lowther, 2011; Indyk, 2012, p. 56).[63]

As Christensen pointed out, a positive trend in the US-China relationship was established by Bush's administrations, culminating in Beijing's approval of a 2011 report to the International Criminal Court on Muammar al-Qaddafi's actions against part of the Libyan population.

> From that peak, however, things went swiftly downhill. When the NATO allies increased pressure on Libya by proposing UN-sponsored military action to protect the population of Benghazi, China abstained in the UN vote. When NATO air forces then exceeded the UN mandate by throwing their full support to the Libyan opposition, resulting in Qaddafi's ultimate capture and killing, China felt betrayed by the UN process. Beijing subsequently joined Moscow in actively opposing U.S. and European efforts to move against the Assad regime in Syria. [...] and [...] opposed sanctions against Russia after its annexation of Crimea (2015).

The failure of a G2 and the signal that China did not intend to operate according to US-sponsored rules, it strengthened the view that US-China relations could be more competitive than cooperative. This could be seen in an escalation from early enunciations of the pivot to statements by John Kerry and Daniel Russel (US Assistant Secretary of State for East Asian and Pacific Affairs) in 2014 and 2015 where the geopolitical interest in the region was highlighted more explicitly:

[62]For a detailed chronological summary of US-China relations with a focus on the alternation of cooperation and competition, see Garrison and Wall (2016, pp. 51-8). For the argument that the discourse on the "pivot" followed electoral mood and calculations see Etzioni (2013, p. 48) and Agnew (2012, p. 6).

[63] For the essence of "strategic reassurance" see Bader (2012, pp. 3, 6-8).

> it is clear that the economic and political aspects of the rebalance have become steadily more, not less, prominent (Foot, 2016, p. 7;Garrison and Wall, 2016, pp. 54-58).[64]

The dyarchy was already history when Xi Jinping affirmed at the Sunny lands Retreat that the USA and China should work out "a new model of major country relationship" (Obama and Xi, 2013). It would be awkward to pretend that Xi Jinping did not mean that China wanted more political power in the future, without hindrance to some expansionary economic and military policies which are important for its transition to a mature economy protected by political influence. But even Obama, who always weighed his words with care, had once stated of China that "first, we seek security, which is the foundation of peace and prosperity" (Obama, 2011c). How was that reconcilable with China's non-negotiable "core interests", like the nine-dotted line expressing its claims in the South China Sea? The tone in Obama's second NSS was even more explicit about how difficult this was going to be, reasserting that "we will manage competition from a position of strength while insisting that China uphold international rules and norms" (NSS, 2015, p. 24).

Along similar lines, Tom Donilon hinted at the impossibility of finding an agreement that satisfied both freedom of navigation and China's territorial claims: "in the coming years, we will continue to […] invest in the capabilities appropriate for deterring and defeating aggression and reassuring allies and partners" (Donilon, 2012).[65] Donilon and Obama echoed Hillary Clinton when she made it clear that the US would not budge an inch on "freedom of navigation" in the South China Sea (Clinton, 2011; Sanger, 2012, p. 395). Obama told Jeffrey Goldberg that his mood about US-China relations had changed: "in terms of traditional great-state relations, I believe that the relationship between the United States and China is going to be the most critical […]" (Goldberg, 2016).[66] Possibly, this sense of urgency was also the message of Secretary of State John Kerry, who stated that the pivot remained "a top priority for every one of us in [the Obama] administration" (Ratnam and Brannem, 2015).

[64]For the Secretary of State's view see Kerry (2014).
[65]Elsewhere he said that the "pivot" was not about containing China (Donilon, 2013).
[66]On the need for greater clarity about China's growth see Obama (2012, p. 2).

But Obama's interventions and the comments from some of those close to him were always cautious and veiled. The bitter truth is that there probably was not much the US could do – beyond preparing for a military confrontation by installing arsenals in the region and strengthening alliances – to convince China to genuflect to US-friendly arrangements. As one writer put it using realist language, the US was– and remains – the "status quo" power, whose actions were *de facto* reactions to China (Stuart, 2012, p. 209). This interpretation seemed to capture well the difficulty in striking a balance between different interests in US-China relations. As somebody else explained

> This is an asymmetric struggle; there aren't many practical steps the United States can take to stop China's dredging. The Pentagon sends ships near the islands to assert U.S. freedom of navigation, but that hasn't slowed the construction. […] "It's not clear what else we can do," a former official told me. "We're not going to start a war, and we're not going to occupy an island ourselves." […] A stronger Vietnamese navy – one that holds joint manoeuvres with the U.S. Navy – would deny China some of the military advantage it hoped to gain from building all those airstrips. […] The idea, in short, is to raise the long-term cost to Beijing. Of course, that strategy works only if the United States is willing to invest in those stronger relationships – through not only a U.S. military presence, but expanded trade agreements, too (McManus, 2016).

This statement is extremely telling of the sensitivity and intricateness of the interactions between the two great powers. Obama tried to cage China in a web of US-friendly economic agreements and military alliances which could represent an obstacle to Beijing's assertiveness without being perceived as confrontational. The US needed to strategy of containment of China that was not perceived as such. This point was reflected by concerns within Obama's first administration about the possibility of adopting a containment strategy, for which reason "rebalancing" was preferred to "pivot", as a former Senior Director for Asian Affairs on the National Security Council revealed (Bader, 2012, p. 3; Christensen, 2015). As Kurt Campbell said of containment, "the very concept […] has little to no relevance to the complexities of an interdependent Asia, in which most states have deep economic ties with China" (Crabtree, 2016).

The fact that Obama's administrations pursued a strategy of hedging (Hemming, 2013) – both balancing against and engaging with China – confirms that an underlying dilemma between private economic interests and state managers' financial and military concerns haunted the White House corridors. However, the limited realist language does not explain what hedging really means. Still, this is an important concept to the extent that it confirms that the "pivot" cannot be judged only according to its military power, as it is a much more multifaceted strategy than the containment applied against the USSR. Of course, it is difficult to imagine the USA not responding firmly, should China embark on military manoeuvres against Washington's allies (Carter, 2016), but the relentlessness of China's regional hegemonic bid and the impossibility for the US to react coercively have restrained the military aspect of the Obama's China policy.

7.3. The military approach to China

The contradictions of US grand strategy illustrated in Chapter 3, should be taken into account when assessing why Obama's foreign policy towards China could not be as assertive as somebody would have liked it to be. In fact, one of the most popular critiques to the 'pivot to Asia' blamed the policy because it projected a weak image of the US and ultimately was not effective in challenging China on a military level. The most important advocate of this position was The Chairman of the Senate Armed Services Committee, John McCain. The latter intervened through an article in the *Financial Times* endorsing the words of Admiral Harry Harris, commander of US Pacific Command, who warned about China's bid for military hegemony in the region – "simple as that". Furthermore, McCain noted that China was not complying with Obama's "three no's" – no reclamation of land, no militarization and no use of coercion (McCain, 2016). A few days later, this provoked a reaction from Beijing's Ambassador to the UK, who blamed the US for rising political tensions (Xiaoming, 2016). Others shared McCain's frustration, and in the last year of Obama's first term, Patrick M. Cronin from the Center for a New American Security in

Washington, D.C. lamented a "great push back", as opposed to a "pivot", following China's abandonment of any intention to take part in a global diarchy with the US (2012). Shortly afterwards, four senators sent a bipartisan letter to the president asking for an interagency to be constituted to clarify the strategy of the "pivot", rather than leaving it to "speeches, interviews, and articles" by many different individuals and institutions (Keck, 2013). Randy Forbes, Chairman of the House Armed Services Sea Power and Projection Forces Subcommittee and Co-Chairman of the Congressional China Caucus, wrote a letter lamenting that both Obama and Congress had not invested enough financial resources in the "pivot" (Forbes and Hanabusa, 2013).

From outside the political debate, scholar Amitai Etzioni challenged the concept of "rebalancing" troops, saying that "the re-berthing of a few ships does not display a significant power shift" (2013, p. 47).[67] During a Senate Armed Services Committee hearing, two independent witnesses complained about the lack of a clear strategy contained in a single document and bemoaned the US military's slow reaction *vis-à-vis* regional A2/AD capabilities (Green and Conant, 2016, p. 2).[68] Jeffrey Goldberg reported that "many people […] want the president to be more forceful in confronting China, especially in the South China Sea" (Goldberg, 2016). Another matter which triggered criticism was China's construction of "harbors, runways and reinforced hangars" on the contested Spratly islands, where weapons have perhaps already been deployed (Buckley, 2016). These arguments were mainly focused specifically on the military aspect of the "pivot", China's increasing military power, its development of A2/AD capabilities and its increasingly assertive territorial claims. However, it is reductive to define Obama's "pivot" as only a military strategy (Stuart, 2012, p. 203; Garrison and Wall, 2016, p. 54), as I hope will be clear by the end of this chapter.

The military 'pivot' was announced officially by the Secretary of Defense Panetta, who spoke of a plan for a geostrategic rebalance according to which the Navy should 'reposture its forces from today's roughly 50/50 percent split between the Pacific and the Atlantic to about a 60/40 split between those oceans' by 2020 (Panetta, 2012). The element that is worth highlighting in this statement is that the policy was going to

[67]See also Govtrack.us (2014). For the early stages of the pivot, see Kitchen (2014, p. 72), while for the resilience of the "rebalancing" see Harold (2014).

[68]For what should be improved on a military level, see the statement by Roughead (2015, p. 2).

develop only partly during the Obama's mandate. However, it is right to stress some ambiguities. On the one hand, the US was quite punctual in facing Chinese naval power. When China called for an Air Defense Identification Zone to be established in the East China Sea in November 2013, Washington promptly dispatched two unarmed B-52s to the area. Furthermore, the US Navy challenged China's territorial claims in the sea several times. In autumn 2015, the USS Lassen entered the twelve-mile limit around the Subi Reef – naturally above water only at low tide, but transformed into an island by China. At the beginning of 2016, the USS *Curtis Wilbur* did the same near Triton, a China-administered island claimed by Taiwan and Vietnam, where the China National Offshore Oil Corporation has built an oil rig (Bosco 2016; Perlez, 2016), while in May 2016 the USS William P. Lawrence repeated this action near China's artificial Fiery Cross Reef in the Spratly Islands.
On the other hand the response was uneventful. In most cases the US Secretary of Defense took a position which defined these acts as either Freedom of Navigation Operations (FONOP) or Innocent Passage – the former hints at a direct confrontational approach to China's territorial claims in the South China Sea, the second at unarmed passage. One commentator advanced the idea that there was a

> concerted administration policy to create a hybrid maritime concept that it can use to satisfy critics of its earlier passivity without challenging China in the conventional manner. It appears that Washington and Beijing have reached some kind of *modus vivendi*, whereby both can claim to have achieved their essential goals (Bosco, 2016).

I do not believe there was any "concerted administration policy", rather there was a need to find a delicate balance between several interests: pivoting to Asia; avoiding jeopardizing economic relations with China; do not appearing too indulgent with Beijing and thus upsetting regional allies who expect the US to provide them with security; do not destabilizing profitable economic relations between US allies and China – as is the case for Australia, with its security-economy dilemma. Ultimately, it was in the interest of Obama and part of his government not to appear confrontational with regard to China, as could be seen when the White House asked for the USS Lassen's activities to be kept out of the public media. The USS Lassen case was so delicate but also difficult that Defense Secretary Ashton B. Carter in October 2015 had to face an interrogation from the Senate Armed Services Committee (Cooper and

Perlez, 2015).[69] Similarly, in early 2016 it was reported that the administration had intervened against its own military, asking them to avoid aggressive language with regard to China (Sciutto and Starr, 2016). While the "pivot" was criticized for being to light, it showed that Obama did not always bend to pressure from the Pentagon, an important element to consider in light of the discussion in chapters 1, 2, 4 and 5. Etzioni confirmed my view in an article about the Air-Sea Battle (ASB), an offensive network which the Pentagon wanted to establish, which seemed to challenge China too explicitly. On the other hand, the same account shows that the military 'pivot' developed quite independently from political control – again, something to consider with regard to some of the arguments in the above-mentioned chapters. For Etzioni

> there is room to question whether the threats have been overstated and to ask if the Pentagon-favored response is the right strategy. The time has come for the White House and Congress to reassess both the threat and the suggested response (2013, p. 48).

Given that the Pentagon has to justify requests for funds if it wants to maintain its budget, it is legitimate to imagine that the choice to develop the ASB was driven not only because of a potential China threat, but also for the financial profits that the military Asia-Pivot could provide. This assumption may be confirmed by an article from Etzioni which explains that civilian inattention to the Pentagon's strategy explained the planning of certain expenses (2014, p. 6). The Pentagon was determined to fulfil not only its own budgetary interests at a time when money allocation was shifting from one branch to another, but also those of its clients. In particular, Etzioni refers to "military-industrial-congressional alliances" competing with each other for access to public funds, involving Lockheed, Boeing, Northrop Grumman and General Dynamics. According to Etzioni, this was even more relevant with regard to the "pivot".

> A major reason the focus on the Far East is preferable from the viewpoint of such major alliances is that preparing for war in this region is capital-intensive, while wars in the Middle East – fighting terrorists and insurgents – are labor-intensive. […] large defense contractors like Lockheed Martin gain little from

[69] During the interrogation, the Chair John McCain was very disappointed by Carter's stance (Cooper and Perlez, 2015).

> funds allotted to military salaries and benefits. By contrast, the major forces to be used in the Far East are those of the Air Force and Navy (2014, p. 14; 2013, p. 48).

Others argued that the logic of profit intersected with the planning of a new integrated doctrine to face China. But instead of innovative ways of coordinating air and sea power in a context of coastal warfare, the Air-Sea Battle was developed in the interest of military-corporate factions.

> [T]he United States Air Force (USAF) wants a new penetrating bomber, a new aerial tanker, as it hopes to acquire enough of its planned 1700 Lockheed Martin F-35As; the Navy seeks to preserve core force levels like its 11 carrier battle groups and 48 nuclear attack submarines as it seeks a more capable/affordable distribution of "fire" capabilities between stealthy and unstealthy "platforms" and new and more capable "payloads" (Fisher, Jr., 2014, p. 209).

The ASB was preferred to alternative options which focused more exclusively on naval power and the protection of trade rather than considering the option of invading China's air-space, as the ASB entails. This was something wanted by the Pentagon and it did not fit well in Obama's non-confrontational approach to China.[70] One criticism that arose was the lack at the heart of the ASB of integration with allies and ground forces which could undermine China's political power, although such criticisms came mainly from the army and probably reflected the financial crisis of landpower (Stuart, 2012, p. 214). The fact that the next big military challenge to the United States was emerging from a country which put the ocean at the core of its interests raised important questions for the land forces branches (Hugh Liebert, 2014, pp. 1, 25; Mearsheimer, 2014, p. 44-5). Because the ASB concept is an adaptation of Air-Land Battle[71] to a region where maintenance of seapower is crucial, arguments

[70] For alternative tactics to ASB, see Etzioni (2013, p. 42) and Stuart (2012, p. 215).

[71] ALB was a military warfighting doctrine adopted in and for the last decade of the Cold War. It was so called because "of its purported emphasis on the full three-dimensional nature of modern battle (two land dimensions plus air warfare)", it shifted "from the traditional emphasis on tactics (as the key to the successful prosecution of battles) to a more operational focus involving the rapid movement of men and materials and the avoidance of decisive confrontations with the enemy", in addition to incorporating "sophisticated technology as a key element in the modern approach to battle (Skinner, 1988, p. 1; also pp. 9-18).

were made for the US military to adopt "new weapon systems" to compensate for China's (coastal) "conventional military advantage", as was the case with the USSR and Air-Land Battle during the Cold War (Stuart, 2012, p. 214).[72]

7.4. *Wilsonianism-cum-primacy* 1: the Bilateral investment Treaty and nuclear trade

Obama's foreign economic policy towards China was, among the other things, an attempt to embroil China in a legal-economic framework which would compel it to act within a regional order run accordingly to US-made rules. It was incorrect to state Obama's attempt to "avoid rivalry" equalled to "avoiding choices" (Green, 2015). Instead, it is evident that Harvey's concept of tension between two logics is perfectly encapsulated in the US-China example. The need to respond to a military challenge coexists with the need not to harm private and collective economic interests. This is the framework within which Obama acted during his mandate. China's businesses and consumers represent an important source of profit for the USA and the world economy. Since the events of Tiananmen Square, US governments have had to bite the bullet with regard to China on several occasions, and a similar argument has been made with regard to dollar-renminbi issues and America's insecurity about acting directly against China:

> there was a clear recognition by many US policymakers that labelling China a "currency manipulator" could well open up a Pandora's box of bilateral and multilateral currency and trade wars that would not only severely roil an already ailing global economy but also bring few tangible benefits to the United States. […] Organized labor in the US would surely continue to complain, but

[72] On the importance of processes like "rebalancing" for fostering technological breakthroughs, see Carter (2015a).

> most large US firms investing in China have determinedly lobbied against any sort of showdown with the Chinese (Ferguson, 2014, p. 138).

Obama invested a great deal of personal political capital in two trade agreements that developed during his two terms of office. The first was the Bilateral Investment Treaty (BIT), which was strongly supported by the US-China Business Council (USCBC). As discussion intensified within the US-China Strategic and Economic Dialogue after the global financial crisis, the BIT represented an attempt by the two countries to break important barriers to mutual trade. As in any trade agreement, the difficulty was in the fact that each country wanted to maintain strategic interests which affected the other party. While China wanted more freedom in the American market, where prejudice still obstructs it from achieving its full potential, "U.S. firms hope that a successful BIT could open up what has become a stagnant investment environment in China" (Council on Foreign Relations, 2016; US-China Business Council). This quote has important implications for US geopolitical objectives. While Obama and his administration attempted to satisfy big businesses requests, the BIT, like the TPP seemed to be being used by US state managers as an instrument to shape the political economy– and therefore the national growth strategy– of China, whose domestic market remains at least partly hostile to foreign enterprises:

> Currently, the United States (and other foreign firms) are blocked from investing in a laundry list of industries in China, from genetically-modified agricultural products and domestic parcel delivery services to news outlets, publishing houses, and television stations. Other sectors are "restricted" and may require foreign investment to come as part of a Chinese majority-owned joint venture. […] it seems China is getting less – not more – receptive to foreign investment; witness, for example, a new rule that bans any company with foreign investment from publishing content online (Tiezzi, 2016b).

In addition to GDP growth, agreements like the BIT bring a degree of free-market discipline to China, and therefore such bilateral legislation is favourable to highly competitive US companies. From an American perspective, imposing discipline meant undermining the core of Chinese economic and military power – its fast-paced, export-driven, state-led capitalist production – in the same way that most states that accepted the terms of US-led globalization had to give up their sovereign control of certain

economic matters. In fact, one of the basic aims of the BIT is to "encourage the adoption of market-oriented policies" (Office of the United States Trade Representative, BIT). This was more clearly explained in a Department of Treasury note blaming China for its slow and "difficult" transition to domestic consumption:

> The relative strength of the U.S. economy has pushed the dollar stronger against many currencies and on a trade-weighted basis over the past year and a half. The related softness in foreign demand has exerted a drag on U.S. growth (U.S. Department Of The Treasury, 2016, p. 3).

One of the challenges in negotiations for this agreement was surely "the possibility of ownership of sensitive technologies or infrastructure by a country that is far from an ally on foreign policy issues" (Hufbauer, *et al.*, 2015, p. 34).[73] But I believe this was not the major point of tension. The BIT was more than anything else an American Trojan horse in the closed Chinese market, as it allowed US companies to be treated in the same way as Chinese companies with regard to regulation, IP protection and dispute resolution. Furthermore, given the size of the rising Chinese middle class, this was a great opportunity for the American export sector. As I will show with regard to the TPP, and as was mentioned with regard to electoral funds, the IT sector and its branches played a very important role in the BIT. Former US Trade Representative Michael Froman explained during a meeting as part of the US-China "Strategic Economic Dialogue" that the US wanted China to liberalize "the $2tn annual trade in high-tech products". He also warned China that "a failure to get a deal on trade in IT would amplify opposition in the US Congress to other trade deals with China" (Donnan, 2014).

While the American government managed to transform the outward pressure of its businesses both in favour of private companies and of its own long term security interests, the interests of capital were also very prominent in the nuclear trade, and the US government allowed certain nuclear technologies to be exported to China. This generated concern among members of Congress, particularly with regard to China's use of reactors to potentiate its naval armaments and to improve Pakistani nuclear facilities and over the activities of Chinese companies (Holt and Nikitin, 2015, pp. 10-

[73] On the transfer of sensitive US technology to China, see Hugo Meyer's *Trading with the Enemy* (2016).

12). The trade-off for the American state here is not only that according to the Nuclear Energy Association (NEA) these agreements will bring billions to the industry and tens of thousands of jobs to the American economy, but also that by providing China with these facilities the US ensured that China will not seek such technologies elsewhere for a while, and that its nuclear development will not drift away from multilateral rules (ibid., pp. 2-4). It remains to be seen whether the American government scored an own goal in doing a favour for the nuclear lobby. However, as far as the Department of Energy was concerned, the agreement will have positive effects.

> Section 123 Agreements are important tools in advancing U.S. nonproliferation principles.[…] the Agreements allow for cooperation in other areas, such as technical exchanges, scientific research, and safeguards discussions. In order for a country to enter into such an Agreement with the United States, that country must commit itself to adhering to U.S.-mandated nuclear nonproliferation norms (National Nuclear Security Administration).

A look at the nuances of the agreement reveals that the deal "does not permit the transfer of restricted data or sensitive nuclear technology" and that there are limits with regard to the percentage of uranium enrichment and re-processing (Holt and Nikitin, 2015, p. 2). Whether China will comply with the rules is another issue, which leaves open questions about the effectiveness of international institutions. Ultimately, the BIT and the nuclear trade aimed to pressure China to accelerate its shift towards an economy that relied less on competitive exports. This was a pressing issue for the USA and was a key American goal for the "China-US Strategic and Economic Dialogue", where Beijing agreed to focus more on boosting its "domestic-led growth" and the USA to relax the hold "on the sale of hi-tech goods" with military uses (Aggarwal, 2010, p. 470).

7.5. *Wilsonianism-cum-primacy*2: the Trans-Pacific Partnership

The most important attempt by Obama's administrations to constrain and shape China's economic power was the making of the Trans-Pacific Partnership (4 February 2016). The TPP story is very important for this work, because it makes most tangible the tension within US grand strategy.
On the one hand, the TPP marked a clear continuity with the history of American free trade agreements. The deal aimed to lower barriers to the competitive circulation of US agricultural goods (Schott et al., pp. 18-24), textiles, clothing and footwear (pp. 25, 31-3; Semuels, 2015; Bivens, 2015).[74] Both TPP and the Trans-Atlantic Trade and Investment Partnership allowed corporations to sue governments through international arbitration – not through that country's own tribunals – a measure which clearly favoured big businesses (Schott, pp. 34-6).

Because the TPP was trade as usual, corporations in every sector supported the deal, and it was energy companies that invested the highest individual sums and it is difficult to analyse the agreement through the fractions of capital approach.

On the other hand, apart from the usual mercantilist posture of the USA and the influence exerted by lobbies on the US administration, the TPP was predicted to have little economic impact. In fact, other issues which are of great interest for this dissertation were at stake. There was an interest in extending US-friendly rules in strategic, competitive sectors: "the T.P.P. is largely a business-driven effort to extend more international protection to the investments, patents, and copyrights of major U.S. corporations" (Cassidy, 2015),[75] a point echoed by Paul Krugman, who felt that despite what "globaloney" thought, the TPP would contribute little to the GDP of the countries involved. In fact,

> as with many "trade" deals in recent years, the intellectual property aspects are more important than the trade aspects. Leaked documents suggest that the US is trying to get radically enhanced protection for patents and copyrights; this is largely about Hollywood and pharma rather than conventional exporters (Krugman, 2015).

[74] Depending on whether they had already delocalized to Vietnam like Nike or still produced in the USA like New Balance (Schott et al., 2013, p. 25).
[75] See also Capling and Ravenhill (2011, p. 561).

Lawrence Summers, the Rubinite chair of Obama's National Economic Council in his first term, offered a more political perspective, explaining that the TPP meant that the stability of the American government was at stake as a consequence of the respect – or lack of it – that the USA and its president could gain as an ally. He drew attention to the novelty of the TPP and what it meant for the global political economy.

> [T]he era of agreements that achieve freer trade in the classic sense is essentially over. The world's remaining tariff and quota barriers are small and, where present, less reflections of the triumph of protectionist interests and more a result of deep cultural values such as the Japanese attachment to rice farming. What we call trade agreements are in fact agreements on the protection of investments and the achievement of regulatory harmonization and establishment of standards in areas such as intellectual property (2015).

So, as Cassidy and others put it, the TPP served to implement legal changes which would favour American big businesses *in primis*. According to Cassidy, the TPP was also about tackling protectionism in particular sectors and countries, such as the tariffs imposed on American cars, beef and rice by Vietnam, Japan and New Zealand respectively. However, unlike classic trade agreements, the TPP aimed to satisfy the requirements of certain companies which predated Obama's election to the presidency in 2008: "it's no secret that lobbyists for industries such as pharmaceuticals, entertainment, and software have been pressing successive administrations to take a tough line on intellectual-property issues" (Cassidy, 2015). But what was this political pressure for exactly? According to Zaki Laïdi, one problem for IT businesses was to fight regulations "on data movement that have required them to decentralize data storage in each jurisdiction rather than through regional hubs" (2012, p. 33-4).[76]Put simply, American IT and IP companies wanted to globalize the data market, which had become a crucial infrastructure of the world economy, particularly considering that the rising monopolies are companies like Google and Amazon. This made even more sense considering the source of the main concentration of individual contributions to Obama's campaigns. Furthermore, businesses in sectors like pharmaceuticals and health, IT, high-technology and entertainment spent around $130

[76] On the importance of data as an asset, see MIT Technology Review Custom (2016, pp. 2-3). On the move from financial to data assets and the value of the latter, see an interview with Sondebegger in Cameron (2016).

million in 2014 lobbying for the TPP (Common Cause Issue Brief, 2015). At the same time, energy companies spent only $35 million overall (ibid.), although this money was spent by only three corporations – Chevron, Exxon, and General Electric – which invested heavily compared to many other companies, probably as they were interested in the potential energy resources lying below the waters of the South China Sea (Voigt and Robehmed, 2011).

But in addition to attempts by lobbies to shape American foreign economic policy, the TPP signalled the structural changes to the world economy that have unfolded in recent years. These changes concern, first, the rise of data-assets and their circulation across borders:

> The digital provisions of the TPP represent a rare example of trade policy getting ahead of the game. Most trade negotiations since 1945 have focused on rolling back hurdles to trade, mainly tariffs, that arose in the 19th century […] moving data across borders is both commercially essential and politically fraught. […] Now, national privacy regulators are able to impose their own restrictions on data flow, precisely the kinds of strictures the Asia-Pacific trade deal is intended to halt […] On the most fundamental level, TPP grants data, for the first time, the same legal protections in international trade law as goods (Dougherty, 2015).

The importance of this shift was also implicitly acknowledged in Obama's discourse. The president highlighted on several occasions the potential of the US economy in this expanding sector and the need to protect its key industries from unfair competition. Although Obama does not say so explicitly, the reference is clearly to China:

> We're making sure that intellectual property is protected, because a lot of what we produce has a lot of intellectual content. We're the software creators. We're the innovators. And if folks in these countries are able to just duplicate what we do and all the research and development that's gone into it, then over time our economic primacy will be eroded (Obama, 2015g).[77]

Similarly, Obama explained in the National Security Strategy 2015 –which was more tailored to his worldview than the 2010 NSS – that it was crucial to "to achieve

[77] The TPP is about economic interests, but also political "leadership in the region" (Obama, 2016f).

ground-breaking agreements to liberalize […] areas where the United States is a global leader in innovation" (p. 17). More to the point, when meeting the Australian prime minister, Obama stressed the importance for the USA of imposing the right international rules and hinted, as on many other occasions, at a divide in the Asia-Pacific region between states that respect these laws and those that do not: "in order for us to thrive in the 21st century, particularly economies that are respectful of rule of law […] it's important for us to be making the rules in this region, and that's exactly what TPP does" (Obama, 2016b). Obama's words provided a sense of urgency, which was confirmed by the fact that in the meantime China was developing a competitive idea of the regional order structured around its own version of the TPP:

> China, on the other hand, is proposing the Regional Comprehensive Economic Partnership, a more mercantilist deal for Asian countries. It asks very little of these countries in terms of commitment to real market-based reforms or to environmental and labor standards. It offers them greater access to China as a gift from Beijing. This might advance China's narrow interests, but it does little for an open, rule-based regional order (Zakaria, 2014).

Over the last ten years, corporations in the IT and high-tech sectors have become increasingly monopolistic, and they have control of a kind of power which is becoming increasingly infrastructural: cloud technology. A representative of General Electric wrote this endorsement for the TPP: "the future of manufacturing will be driven by the ability to analyse data locally and across borders to enhance the safety, efficiency and reliability of products" (Tradewinds, 2015). Securing the free transnational movement of data is crucial to the new colossuses of the world economy such as Facebook, Apple, Microsoft, Amazon and Google, which have "legitimate concerns" about China concerning restrictions and hacking (Rushford, 2012). In a demographically young and technologically dynamic region like the Asia-Pacific, Silicon Valley's corporations would thrive if the United States were to succeed in becoming the world data server, the global *hegemon* of data, by making a safe "global Internet" driven by (American) rule of law. This would ensure "cross-border data flows, consistent with governments' legitimate interests in regulating for purposes of privacy protection" (Office of the United States Trade Representative, E-Commerce).

The rise of data to an infrastructural asset of the global economy does not tell the entire story. As Lawrence Summers put it, this also has to do with the changing relations of power in an increasingly multipolar world and the crisis of multilateralism in the context of the strengthening of national interests: "concerns that trade agreements may be a means to circumvent traditional procedures for taking up issues ranging from immigration to financial regulation must be taken seriously" (2015). This is one of the political issues hiding behind the TPP. In addition to supporting the interests of American lobbies and acquiring control of a contemporary global commons(cyberspace), the TPP served as a tool to bring the increasing power and opposition of China and other rising countries within multilateral institutions: "with the WTO in hiatus, "megaregional" agreements like the TPP and the Transatlantic Trade and Investment Partnership between the European Union and the United States are setting the standards for global trade" (Dawson, 2015; also Capling and Ravenhill, 2011, p. 560). This means that Obama's pressure to conclude the TPP was part of a broader American strategy stemming from the slow negotiations in the Doha Round of the World Trade Organization, whose members were less prone to accepting US-friendly rules (Laïdi2012, pp. 33-4; Pilling and Donnan, 2013; Capling and Ravenhill, 2013, pp. 185). If China wanted to be part of the TPP, it had to accept the rules it was rejecting "in a multilateral setting like WTO" (ibid., p. 34). This tactical approach has been described in a catchy phrase, as "a strategy that negotiates with China chiefly by not negotiating with China at all" (2012, p. 6; Chukwumerije, 2009, p. 47; Wolf, 2015).

It was also argued that large trade agreements had other practical advantages for the WTO, such as eliminating the many Preferential Trade Areas (PTA) which were in place in the Asia-Pacific region (Capling and Ravenhill, 2013, p. 187). This was an additional benefit for the USA, which was hindered in the Asia-Pacific market by the "proliferation" of these many small regional agreements (Kirk, 2009, p. 3; Cheng and Chow, 2014, p. 119).[78] But for the USA, beyond its economic objectives the TPP had a geopolitical value central to the US battle with China for hegemony in the region.

What is directly at stake for the United States within such a framework, apart from the benefits for its companies? Intervening in a global political economy which is

[78]For regional competition as a pull factor, see Green and Goodman (2016, pp. 22-24).

changing due to the rise of data-assets and the emergence of newly powerful countries in multilateral institutions has two advantages for American governments. Firstly, regarding the rise of data, it is easy to see the relation between the infrastructure provided by Silicon Valley's companies and the National Security Agency's gathering of information about rival states and social and political actors which represent a threat to American capitalism. In a world where the social, economic and political spheres have all grown increasingly volatile, and where threats can travel via the cloud, the TPP offered the right tools to increase control of data of various sort. In fact, the Trans-Pacific Partnership's goal of opening up national servers could make the life of spy agencies much easier. This is why the Office of the US Trade Representative was upset with Canada when the latter launched a plan "in 2011, to build a unified email system for the entire federal government that would require data to be stored within Canada. That privacy regulation essentially ruled out U.S.-based companies from bidding on the contract" (Tencer, 2014). This consolidated Canada's cyber-sovereignty, although the country remained concerned about its internet consumers, because most traffic is routed through the USA anyway (ibid.). But the government most concerned with cyber-security should be the USA, since it is the most "web-dependent economy" (US-China Economic and Security Review Commission, 2015, p. 192). A lack of defence against cyber attacks and a lack of access to other countries have high costs for American IT businesses (pp. 193-4, 210-1). At the same time, it has been reported on several occasions that the Chinese military or its surrogates were behind "intrusions" into the databases of American companies (pp. 198-200).[79]

Secondly, with regard to US geopolitical ambitions, the TPP was used by Obama's administrations to undermine China's economic and ideological aspirations in the region.[80]In the discourses of Obama and others, the TPP was often associated with US-China regional competition, not so differently from the kind of narratives developed in the past by Paul Wolfowitz and George W. Bush. For instance, why did Ash Carter think the TPP was an essential tool for both "regional security" and "American influence and leadership" (Carter, 2015a)? The message addressed what

[79]Ultimately this brought Obama to issue an executive order imposing sanctions on "malicious cyber-enabled activity" (US-China Economic and Security Review Commission, pp. 204-5; Obama, 2015d).

[80] Obama and his administrations were frontrunners to the extent that they invested much political capital, despite the Asia-Pacific region still being behind Europe in terms of economic opportunities, as US foreign direct investment (FDI) in the Old Continent is still far higher than that in Asia (Jackson, 2013, pp. 3-4).

seemed to be an elephant (or better, a dragon) in the room, particularly for the Democratic Party, given that Republicans and the military were always more comfortable criticizing China, as John McCain demonstrated in calling China a "bully" in the *Financial Times* (2016). Still, although top Democratic politicians seemed uncomfortable speaking about China as a competitor, on some occasions they came out unequivocally. While reassuring the Australian parliament about American intentions in the Asia-Pacific region, Obama stated that

> We need growth that is fair, where every nation plays by the rules; where workers' rights are respected, and our businesses can compete on a level playing field; where the intellectual property and new technologies that fuel innovation are protected; and where currencies are market driven so no nation has an unfair advantage (2011c).

This implicitly anti-China perspective and the goal of a US-designed regional order were further confirmed in the NSS 2015, in which Obama stated that the TPP was a crucial part of the effort to

> [work] with our Asian partners to promote more open and transparent economies and regional support for international economic norms that are vital to maintaining it as an engine for global economic growth" (p. 24).

What emerges from these words is that the main issue at stake was the problem of Asian state-led development, and it was clear which country remained the most claustrophobic for private economic initiative. Given that China's authoritarian capitalism represented the main engine for maximizing Beijing's geopolitical strength, Obama was sending a clear but indirect message to China in an attempt to undermine its hegemonic influence in the region, saying that "prosperity without freedom is just another form of poverty" (Obama, 2011c). Most recently these concerns were restated by the US-China Economic and Security Review Commission, which in its annual report to Congress complained about Beijing's use of "state-owned enterprises (SOEs) as a tool to pursue social, industrial, and foreign policy objectives" (2016, p. 120).[81] Within this framework, a statement by Secretary of State John Kerry

[81] This confirmed, for instance, what Ann Capling and John Ravenhill wrote about the post-9/11 tendency of American state managers to implement security measures or strengthen America's

and Secretary of Defense Ash Carter in a largely unnoticed *op-ed* written in *USA Today* contained a veiled but unequivocal message for China.

> [O]ur rules-based system is now competing against alternative, less-open models. Nowhere is that clearer than in the Asia-Pacific region. To revitalize and expand the system that has served us so well, we must be strategic in growing and exercising our economic strength, as TPP would in a number of ways. […] For the first time in any trade agreement, TPP would address state-owned enterprises and ensure that the Internet remains open and free. […] The strategic stakes extend beyond the Asia-Pacific region. Fundamentally, TPP presents a choice between two futures (2015).

China was only rarely mentioned in these speeches and articles, but when Obama did so he did not hesitate to foreground American interests, describing China as an economic challenge:

> [I]f we fail to get the Trans-Pacific Partnership done, if we do not create the architecture for high-standards trade and commerce in this region, then that void will be filled by China, it will be filled by our economic competitors. They will make the rules, and those rules will not be to our advantage (Obama, 2015g).

Furthermore, Kerry and Carter's *op-ed* spelled out that the strategic goal of the TPP went beyond the calculations of a few private economic actors, as the agreement represented part of a broader bid to maintain regional and global hegemony whose result will depend on the 21st century US-China balance of power. They were unambiguous in stating that "like the rest of President Obama's rebalance to the Asia-Pacific, finalizing TPP would reaffirm that America will be a leader in the region for decades to come [emphasis added]" (2015). This echoed Obama's words about the importance of the new regional order for the global order in the making. Asia will "define whether the century ahead will be marked by conflict or cooperation, needless suffering or human progress" (2011c).

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geopolitical position *vis-à-vis* rival states through trade agreements (2013, p. 192).

Ultimately, although Obama was accused of implementing an overly soft "pivot to Asia", many overlooked the geopolitical calculation and coercive logic of the Trans-Pacific Partnership. The history of the making of this now dead agreement shows the USA as struggling to maintain in place through international law and commercial diplomacy a global set of rules which has proved crucial to the country's position as global *hegemon* since the Bretton Woods regime was created. As Wesley put it, the current competitive regionalism in the Asia-Pacific region is for the sake of the regional order: the TPP signals a rivalry produced by 'competitive regionalism' and the attempt to fight back through 'socialization' the order 're-engineering' of China (Wesley, 2015, pp. 487, 492).

7.6. Diplomacy of the rebalancing 2: Japan and India, diverse alliances and one pan-continental strategy

Obama's emphasis on diplomacy was not only evident when he wanted to make peace with Russia and Iran. As Obama announced in a defence planning document, his administration was keen on expanding its network of allies across the Asia-Pacific region (Defense Strategic Guidance, 2012, p. 2). In fact, taking care of alliances in the region was one of Obama's missions, and he flew on average more than once a year to visit countries and attend summits and ceremonies in the Asia-Pacific region, reassuring partners about the US commitment to the region. He began by resurrecting dialogue on Shinzo Abe's project for the Quadrilateral Strategic Partnership between Japan, the USA, Australia and India, which had ended after 2007 when Australia stepped back due to an economic/security dilemma over how to position itself in the US-China competition field (in addition to a cultural dilemma).[82] This diplomatic-military arrangement was dubbed the "Asian NATO" or, without Australia, the "New Triple Alliance" (Twining, 2015).

[82] Peter Katzenstein has argued that Australia is struggling with "conflicting collective identities" between the West and Asia (2000, p. 55).

Of all the alliances, those with Japan and India are the most important, although they are very different from each other.[83] The deal with Japan is highly security-focused, both because of Japan's geographical location and due to its longstanding integration in the global economy, in contrast to the alliance with India, which was mainly aimed at consolidating the economic development of the rising country. A glance at the map shows clearly that the US alliances with Japan and India, as well as increased cooperation between Tokyo and New Delhi, have vindicated Nicholas Spykman's famous argument about the naval supremacy of Rimland over Heartland states (1938). These alliances are extremely important if the USA is to thrive in the Asia-Pacific region, but at the same time they present limits and challenges– particularly with regard to Japan. Such a delicate diplomatic condition is probably what explains Obama's intense work.

Shinzo Abe was the first Japanese Prime Minister to address a joint meeting of the US Congress, when he paid a visit to the Arlington National Cemetery, while Obama became the first American president to attend the commemoration ceremony at Hiroshima. But Japan's domestic issues generated some concern in the USA. About 100,000US military personnel are posted in Japan, which in theory gives the USA the ability to outflank China and makes external help available to Japanin the event that China decides to attack it. However, this arrangement is undermined by China's A2/AD capabilities, which could make it difficult for the USA to act from within the first-island chain and might mean that the US would want to withdraw some of its forces from Northeast Asia,[84] although such an application of "offshore-balancing" would be seen by Japanese policy-makers as abandonment (Jimbo, 2014, p. 82). In addition, working out the alliance with Japan was not the easiest task for US foreign policy officials. From a regional perspective, allies like Japan and South Korea obviously play a less effective role outside a multilateral framework. However, US-Japan-South Korea trilateralism has been hindered by tension between Tokyo and Seoul caused by a debate over the historical memory of WWII Japanese imperialism. Even more problematic is Japanese revisionism about its colonization of Korea and the

[83]Some talk of a "strategic triangle" which includes Australia (Ali, 2012, pp. 59-99), but Australia does not appear to be as crucial to changing the regional balance of power as the other two allies.

[84]On ASB and the risks to Japan, see Stuart (2012, p. 215); on China's capability to harm the military facilities of both the USA and its allies, see Ali (2012, p. 53).

latter's concerns about a "realist revival" of the former, plus a different vision of regional security inside the Six-Party Talks with North Korea.

As if this was not enough, Japanese politicians were wary about the American posture towards North Korea and China's regional role. In particular, Bush's government generated some insecurity in Japan when it denied the possibility of using F-22 bombers while increasing its engagement with China, which made Japanese elites think about a return to a "Japan passing" era (Schriver and Stokes, 2009, pp. 4, 7).[85] After Prime Minister Shinzo Abe was re-elected in 2012, Japan was allowed to undertake some transformations of the institutional and material dimension of the military sector, which increased Tokyo's ability to both defend itself and intervene in Asia-Pacific scenarios. In April 2015, Obama and Abe agreed to a revised version of the Mutual Defense Guidelines, which had remained untouched for almost twenty years.

> The new guidelines deepen alliance cooperation in a way that more intricately intertwines U.S. and Japanese security, making it difficult to avoid involvement in each other's military engagements (Chanlett-Avery and Rinehart, 2016, p. 3; 4, 14).

This agreement followed reform of the post-war constitution and allowed Japan freedom of action with regard to its own defence, ballistic missiles, out-of-area interventions and mutual defence, as long as this is done in coordination with the USA and the alliance's goals (Fackler and Sanger, 2014). This shift in Japan's national security arrangements was also brought about by pressure from Japan's increasingly assertive Democratic Party to move the US air base in Okinawa and opposing the refuelling of US navy missions bound for Afghanistan (Pessin, 2009).

India has a crucial role in the American attempt to contain China, for as powerful as the Air-Sea Battle network may be, even with Japan's help there is nothing that could be more important for US strategy in the Asia-Pacific region than an economically developed, fully committed, militarily strong India. Obama stated in an important official document that "the United States is also investing in a long-term strategic partnership with India to support its ability to serve as a regional economic anchor and

[85] For a more specific study of security discussions and arrangements concerning the US-Japan alliance, see Ali (2012, pp. 62-76).

provider of security in the broader Indian Ocean region" (Defense Strategic Guidance, 2012, p. 2).

There are two reasons for this. Firstly, once the government in New Delhi has maximized its military capability – probably in the next ten to fifteen years – it will be the most powerful ally the USA can count on, not only in the Indo-Pacific area but worldwide. Secondly, as Kaplan would say, geography will matter, as India is in a better position than Japan. Japan could not only be the target of China's destructive military power, but it would struggle to fight beyond the East China Sea. In contrast, India could exploit its advantageous location in the Indian Ocean and blackmail China, or it could move part of its fleet towards the Malacca Strait without running the risk of retaliation, other than some military pressure on the Himalayan border and in Kashmir through Pakistani troops. In the medium to long term, the US will have little chance of competing successfully with China without India's support. As Obama put it, "we see a strategic convergence with India's Act East policy and our continued implementation of the rebalance to Asia and the Pacific. […] and to advance regional economic integration in South and Central Asia" (NSS 2015, pp. 24-5).

India has increased its fleet by 100 vessels, and it is trying to realize a plan to indigenize defence manufacture in order to export part of it to the Asia-Pacific market (Tweed and Bipindra, 2015). As part of the strategy to face the geopolitical challenges ahead and in coherence with the objective of enforcing a US-friendly rule of law across the world, Obama believed that it was a strategic move to "support a reformed United Nations Security Council that includes India as a permanent member (Obama, 2015b). India is not only indispensable for US success in Asia, but it is also the ideal ally, because the two countries share concerns about both China and Islamist terrorism – unlike other US allies like Japan and Israel. Obama once stated that India and the US are "natural allies" on several issues (2009g), because India can claim that the liberal values of its plural democracy are the same of those enclosed in the American Constitution.

Last but not least, India's size and geographical extension will be crucial in terms of the power necessary to cope with China (Kelly, 2010, pp. 715-6). However, the limit of an alliance with India is that while the US-Japan alliance seems unquestionable for the foreseeable future, should India become a powerful and assertive regional actor it

might disengage from the USA or act with more independence than Japan. Surely at this stage nobody can foresee whether India will be as faithful an ally as some European countries have been to the USA since the end of WWII. The future is certainly promising for the USA, thanks in part to the important initiatives through which the two governments have attempted to create business opportunities for their respective private sectors, as in the case of the Indo-Pacific Economic Corridor (IPEC), or when American companies were involved in improving Indian economic infrastructure, as explained by Kerry and Pritzker in an *op-ed* (2014). Several passages of Obama's speech to the Indian parliament at the beginning of his first administration underlined that it is important for the two nations' technology sectors to cooperate, as American companies have much to offer Indian firms in the areas of defence, civil space and agriculture. He then lifted one of the remaining bans on exports to India which had the potential to generate $6bn (Obama, 2010c; Burke, 2010). In other words, Indian development is crucial for at least four reasons: the USA may gain a strong military ally; American companies will be able to invest in India; India could become a more attractive place for (particularly American) investment, which could damage China; and resource-rich countries will not be as dependent on China, as in the case of the Central Asian republics discussed earlier on. In other words,

> [a]s the US allowed Europe and Japan to free-ride on the American market during the early Cold War, so it may do with India. Indian growth is in America's security interest; a weak, isolated India cannot be the pivot of dual containment. Trade deals with India would ignite more rapid Indian growth and so divert US foreign direct investment away from communist China to democratic India (Kelly, 2010, p. 717).

Other alliances and projects for regional integration were established between Central Asia and the South China Sea ring.
Following Clinton's slogan for connecting the region "from Almaty to the Indian Ocean" (2011) some initiatives arose. These are the "Afghanistan-Pakistan Transit Trade Agreement"; the Turkmenistan-Afghanistan-Pakistan-India (TAPI) gas pipeline; the USAID-led "Regional Cooperation Framework" for trade barriers; the Cross-Border Transport Accord (CBTA) between Afghanistan, Tajikistan and Kazakhstan; the CASA-1000 electricity grid from Tajikistan and Kyrgyzstan to Afghanistan and Pakistan; and the Transit-Trade Agreement between Afghanistan and

Pakistan (US Department of State, 2015; McBride, 2015; Mankoff, 2013, p. 19; Nichol, 2014, pp. 42-56). This American diplomatic-economic activity in Central Asia hid the return of an old geopolitical refrain. While the US is not directly concerned about its energy security, the argument *à la* Brzezinski seems inevitable.

> The political objective of the US government is to prevent energy transport unification among the industrial zones of Japan, Korea, China, Russia, and the EU in the Eurasian landmass and ensure the flow of regional energy resources to US-led international oil markets without any interruptions (İşeri, 2009, pp. 34-5).

During Obama's mandate ties were renewed with Central Asia through a joint declaration on regional security signed by the United States, the Republic of Kazakhstan, the Kyrgyz Republic, the Republic of Tajikistan, Turkmenistan, and the Republic of Uzbekistan (U.S. Department of Defense, 2015).

In April 2015, the US renewed the 1951 Mutual Defense Treaty with the Philippines through the Enhanced Defense Cooperation Agreement (EDCA), which for Manila signalled a shift from a focus on "internal security to external defense". This meant that the USA could return to Subic Bay in2015, providing a safe station for the Navy (Mogato, 2017). However, the election of Duterte undermined these agreements, although the tensions seen between the Filipino president and Obama may be remedied by positive relations with Trump. The Philippines has some territorial disputes with China, the most complicated of which is currently the rotation of Filipino troops at the Second Thomas Shoal (or Ayungin) (Locklear, 2015, p. 12). The military alliance with Thailand has been strengthened since civilians returned to power, as has that with Indonesia, which has bought new armaments from the USA. In May 2016, Obama announced that the USA was lifting the lethal weapons embargo on Vietnam, a decision of great symbolic value four decades after the end of the Vietnam War (Harris, 2016). Hillary Clinton launched the Lower Mekong Initiative at the very outset of the first Obama administration, an initiative which has so far received little funding, although it is a chance for US soft power to appeal to countries in the Indochinese region through a fight against China's selfish erection of two large dams on the Mekong River, affecting the financial, environmental and alimentary safety of its southern neighbours (Storey, 2011, p. 77; Clark, 2014; Chang, 2013; U.S.

Department of State – Lower Mekong Initiative FAQ's). Obama and his government progressively relaxed most sanctions on Burma between 2013 and 2016, following pressure from several economic institutions – AmCham Myanmar Chapter, the National Foreign Trade Council, the US-ASEAN Business Council, the United States Chamber of Commerce and the United States Council for International Business, as well as helping US companies like GE, Ford, Chevrolet, Coca-Cola and Colgate-Palmolive to establish in the Indian market (Hammond, 2016).

While engaging in such intense diplomatic action, Obama presented his own arguments to convince regional actors to stick with the USA rather than follow China's siren song. But although there were different issues to be addressed in each country, overall Obama's diplomacy developed as part of a coherent ideological discourse which reflected his personal experiences and identities, but which also reaffirmed in people's and politicians' minds that the United States was, naturally, a Pacific power.

Conclusion

This chapter provided an overview of the multifaceted strategy adopted by Barack Obama and his administration in the Asia-Pacific. The principal aim of this strategy was to respond to the rise of China and secure America's hegemonic hold of a region whose control has become crucial for lobal dominance.
The chapter has pursued this goal by organizing the narrative according to different themes, in order to provide a comprehensive analysis.
It began by explaining the logic behind Obama hope for a normalization of relations with Russia and Iran. That section advanced the argument that this strategy of diplomacy-led stabilization of Eastern Europe and the Middle East was coherent with Obama's interest in rebalancing towards Asia. Put simply, fewer troubles with Moscow and Teheran could allow the US to focus on China. Furthermore, as it was showed in Chapter 6, Obama's view was that the US should have decreased its military presence in both areas – a sort of "offshore balancing".
In the rest of the chapter, the main thematic thread was the tension – endemic to American grand strategy – between a US-friendly, global geoeconomic openness and military primacy. This tension, in fact, has captured well the attempt of Obama to balance between the competing logics of powers of US foreign policy.
On the one hand, Obama could not allow China's assertive foreign policy to breach the rules of international law. On the other hand, every diplomatic and military action had to be carried out with caution, so that relations with a crucial partner-enemy were not jeopardized. The consequence of this delicate equilibrium was that Obama's "pivot to Asia" developed along three different areas.

The military strategy had mixed results. While Obama attempted to avoid the use of confrontational narratives about China, American ships often provoked Chinese authorities near contested islands. The Pentagon deployed the Air-Sea Battle (ASB) – an approach challenged by many inside the American military bureaucracy – to preparing for containment. However, taking advantage of Obama's search for a precarious balance between geoeconomy and geopolitics, China managed to occupy the contested islands and equip them with military hardware.
The lack of an assertive reaction from the US, however, should not be interpreted as a form of appeasement. It was explained that the US is in a difficult position to the extent it is the "status quo" power; therefore it can only react to Beijing's action

because it does not have, *a priori*, an interest in destabilizing the regional order. However, it was also highlighted that while Obama initially sought a cooperative relation with China, half way through his first mandate the mood inside his administration began to change.

The most important area of the 'pivot to Asia' was foreign economic policy, mainly represented by the Trans-Pacific Partnership (TPP) and the Bilateral Investment Treaty (BIT). The overall objective of these agreements was weakening China's geoeconomic and geopolitical power by undermining its state-led capitalist economy and opening it up to a global system in which the US is highly competitive. While the TPP attempted to limit China's trade with the Asia-Pacific region by imposing rules that were hostile to Beijing's economic model, the BIT aimed at helping American companies to open up the Chinese domestic market and improve the competitiveness of industrial sectors in which the USA remains world leader.

Central to the attempt of dealing with China in between cooperation and containment there was Obama's intense diplomatic action. With this, Obama secured or reinforced alliances in what Spykman called the Rimland: Japan, South Korea, Australia, the Philippines, Thailand, Vietnam, Central Asia and above all India. While it is unclear at this stage what will happen with regard to the Philippines, I argued that India more than any other country is the indispensable ally for any US-led anti-China coalition. However, the posture India will adopt in the future cannot be predicted, although Japan will no doubt be fully committed to an alliance with the US.

To sum up, two overarching points can be extrapolated from the chapter as a whole. Firstly, this chapter confirms the importance of knowing the different worldviews of US state managers and how these inform their interpretation of *Wilsonianism-cum-primacy*. In particular, Obama pursued this goal through a global strategy in which, military power was just one element.
Secondly, under Obama the US stepped up measures to counter the rise of China in a way that is probably best described by the concept of hedging: mixing confrontation with engagement. This was, anyway, a signal of mounting inter-imperialist rivalry. In fact, if US state managers were driven by an ideology of pure globalism, should the rise of China not be interpreted as an opportunity for busting global trade and for decreasing – rather than increasing – military resources in Asia-Pacific?

On the other hand, this section of the thesis has not hidden at all the fact that US-China relations are highly constrained by both US-China economic interdependence and the importance of China as global economic locomotive.
This suggests that while US-China relations are increasingly developing into an inter-imperialist rivalry that has the potential for systemic consequences, it cannot be overlooked the parallel Kautskyian condition of this great powers relationship.
While nobody knows whether it will be Lenin or Kautsky who will emerge as the intellectual winner, what is sure is that Obama's strategy towards China was extremely careful at maintaining a balance between these two souls. But future presidents might opt for a different strategic synthesis of geoconomic and geopolitics that is informed by a more realist rather than globalist interpretation of America's nationalism.

Conclusion

Before drawing some conclusions related to the objectives and results of this dissertation, it is necessary to highlight that this work has fulfilled an important deontological mission for academic scholarship. Despite its limits, it has made a courageous attempt to provide a critical and comprehensive account of American power during Barack Obama's term of office. The ethical value of this effort is to be found in the fact that it has tried to revive debates on imperialism during Obama's mandates. While George W. Bush attracted the interest of a burgeoning amount of scholarship, and Donald Trump is about to do the same, Obama's imperialism was met with less enthusiasmby many observers.

Instead, the picture of American geopolitics that emerges from this work shows that the Obama presidency will certainly be more consequential than that of Bush, and probably the most consequential since the beginning of the post-WWII world order. This is not only because of Obama's geopolitical skills, which were quite advanced for somebody who used to be an outsider to foreign policy, but also because he operated during a phase marked by two important historical watersheds in the summer of 2008: the Beijing Olympics in August that year and the collapse of Lehman Brothers on September 15. Obama carried the US through a time when a lot changed and the country had to adapt to a new world order in which multipolarity and fragmentation became normal features of the global political economy, from geopolitical power to institutions of governance and from cultural truths to social issues. Within this context, Obama focused on two intertwined objectives: solving the crisis of capitalism at home and adjusting the geostrategic focus to China, America's greatest challenge.

In this thesis I have attempted to achieve one theoretical and one empirical objective. On a theoretical level, I have explored the possibility for Marxism to become a fully-fledged theory of International Relations which can offer an analysis of both the economy and the politics of imperialism, despite Marx's failure to develop a systematic theory of the state. My solution to the lack of a direct connection between political strategies, interests and violence on the one hand and capitalist imperialism

on the other was to integrate three levels of analysis: the global uneven geographical development of capitalism, the relation between states and powerful businesses and the ideologies of state managers. In particular, I have attempted to justify the geopolitical autonomy of state managers *vis-à-vis* the individual interests of private capital by shifting attention onto the economic and political value of space. The bottom-line of my argument is that while imperialism remains a structural feature of capitalism, political elites produce imperialist policies according to their ideological understanding of geopolitical challenges. These solutions can both be coordinated or in conflict with the interests capitalist ruling classes.

I have also suggested that social constructivism, more specifically the analysis of strategic cultures, is a topic that Marxism might explore in order to develop a political theory of imperialism. In fact, the concept of strategic cultures allows the historical, geographical and cultural logics behind the projection of state power to be understood, which certainly opens up space for further research on the connection between Marxism, geopolitics and constructivism. The ultimate conclusion of the theoretical part of the thesis is that imperialism results from pressures exerted by the global capitalist environment, which are translated into competitive foreign policy according to national power dynamics.

In the case-study, I attempted to demonstrate how the different theoretical levels presented in the first three chapters intersect with one another in the making of American imperialism during Barack Obama's presidency. Initially, Obama sought to resolve the economic crisis both in the US and globally while approaching China to form a G2. However, after this failed attempt American imperialism has focused slowly but steadily on the Asia-Pacific and China.

I have demonstrated that Obama articulated his anti-China strategy firmly although not so aggressively, because he had to take account of many factors. Increasing US-China economic interdependence and the increasing threat of China's regional military capabilities did not allow Obama to adopt an approach to this rival which was explicitly confrontational and clear to both electors and pundits. The consequence of this was that during Obama's term of office US imperialism in the region was clothed in garments made by knitting together various threads of power, from naval capability to geoeconomic engineering and from diplomatic coordination to ideological

seduction. It is exactly this richness of elements that allows me to restate here once again what I have attempted to argue throughout this thesis: that it is reductive to describe imperialism as merely an economic phenomenon, while it is essential for the sake of truth, clarity and intellectual curiosity to provide an account of how politics in all its shapes can add complexity to the straightforward, money-driven logic of capitalism.

Ultimately, it is no exaggeration to state that what emerges from this analysis of US foreign policy during Obama's presidency is the formation of an early-stage but evident inter-imperialist clash, generated on the one hand by the need of a quasi-global hegemon to maintain political control of the most strategically important region in the world if is to remain an unchallenged leader, and on the other hand by the need of a rising economic powerhouse to expand its financial and political spatial reach if it does not want to collapse before it can fully emerge. Obama has passed the baton to a Trump administration which seems neither willing nor able to adopt the kind of political flexibility demonstrated by Obama's governments, and which might favour straightforward solutions at a time of rising socio-economic and cultural tensions across the United States. America's first African American president faced China and world issues with an integrated understanding of the processes that constitute global politics. Meanwhile, Trump would like to solve the crisis of US capitalism and power by loosening restrictions on the banking sector and cutting the budget for almost every branch of bureaucracy apart from security and defence, which will both see an increase.

Driven by his veneration for Andrew Jackson, Trump will adopt a muscular foreign policy which will overlook Russia, the Middle East and minor geopolitical and humanitarian crises as long as possible, in order to prepare the United States to wrestle with China in the Asia-Pacific region. In fairness, apart from the increase in military spending, this is in clear continuity with Obama's grand strategy. In fact, post-Bush American imperialism is slowly but relentlessly recovering from its preoccupation with Middle East-and reorganizing itself on geopolitical vectors aimed at the Pacific Ocean, the Indian Ocean and Central Asia. However, constant observation of the geopolitical calculations of the various groups of state managers remains essential, because while the pillars of US grand strategy do not change, the complexity of an integrated but highly diverse world order presents a difficult test for policy-makers. In

their attempts to adapt to this constantly changing world, different American administrations will each put forward their own plans, with their own consequences.

Afterword: the Trump Administration

An issue of great concern for this dissertation has been the need to highlight the fact that neither is politics a mere epiphenomenon of the capitalist mode of production nor is its relation with economics always unidirectional. With all the incongruence and conflicts this might bring, politics is not a passive agent of capitalism, although it often does not act manifestly in its favour. While it is highly unlikely that political elites will take a purely anti-capitalist view – no communist revolution has yet happened where capitalism is most advanced – politics, and above all democratic politics, certainly complicates the capitalist system. This is one of the meanings of the electoral success of Donald Trump, a charismatic president driven by an uncompromising worldview and backed by a strong electoral mandate. Trump was crowned president after he made unequivocal and ambitious promises addressed to radicalized voters – "the forgotten men and women" of the United States (Trump, 2017). This is likely to be the most significant point of tension between the Trump Administration and the capitalist ruling class, alongside Trump's view of US global policy and identity politics, which are explored below. Trump's strong mandate means that at the very least he will have to appear tough on some of the socio-economic problems that have afflicted many US citizens. While the new president's geo-strategy with regard to US imperialism will show crucial continuity with Obama – see below – his approach to global policy is diametrically opposed to that of his predecessor.

While Trump's administration has remained generally close to capitalist ruling elites – and Trump certainly belongs to this group – he has maintained a highly politicized posture by virtue of his strong mandate and arbitrary attitude. Most importantly, this tension between being among the richest people in the US and wanting to represent ordinary people begs an unavoidable question which has often been present as this dissertation has developed. Are Trump's rhetorical attacks just fog he uses to confuse frustrated citizens so he can continue the programme of crony capitalism? Or is he a portrait of the complexities which characterize relations between private economic power and political power? Inderjeet Parmar, who wrote at length in the pages of *The Wire* in the months following Trump's election, would probably agree with the first description, as he sees Trump's presidential experience through the lens of elitism. For Parmar, the answer to the Trump enigma is straightforward. The new president

> has not drained the swamp but moved the government right into the middle of it and is immersing the departments of state in the calculus of the fast buck (Parmar, 2017).

On the one hand, highlighting the incoherence between Trump's rhetoric and his action brings dolorous truth to the surface. Despite his anti- globalism, he has stuffed the new administration with nominees who are in favour of free trade and agreements like the now defunct Trans-Pacific Partnership or represent the "Who's Who of Wall Street and corporate America" (Martin, 2016) – despite after Charlottesville events, three of them resigned (Erman, 2017), only to confirm the tension between Trump and sections of the ruling class. If Trump's election is a blow to internationalism, it hardly means the end of financialization or capitalism. Instead, this seems more like the prologue to a further fascistization of the system. This approach could be synthesized with "old-school *Reaganomics* – giveaways to the rich and pro-corporate deregulation – rebranded with a *nationalist* and protectionist twist" (Cassidy, 2017) – talks about orporate tax cuts and a reform of the Dodd-Frank Act are an evidence of this (Platt and Samson, 2017; Pozen, 2017).

The societal: Trump, big business and the bureaucrats

While the elitists are right to say that the American economy is increasingly run by monopolies, Trump's attacks on the "dumb market" and Mike Pence's idea of "economic nationalism" are the lenses through which the new president and some of his advisors understand US global affairs, even though the administration is split between centre-right globalists and nationalists (Sandbu, 2017).

This worldview – explored more in depth in the next section of this Afterword – was the source of important societal tensions.
This is further complicated by Trump's dialectical style and strategy, which gives sections of the capitalist ruling class a sense of lack of control over the government. Many have highlighted that in the process of dialogue with the White House, big businesses were caught in a Byzantine and Kafkaesque condition (Talbot-Zorn, 2017). Trump's immigration ban threatened to damage the bio-tech industry, which reacted with outrage (Johnson, 2017). In contrast, the pharmaceutical sector did not engage

Trump on the ban, despite the industry's continuing dependence on migrants (Johnson, 2017).

Ford was among the businesses that felt most threatened by the ban. The company expressed its concerns about exports to the Middle East, but other car manufacturers did not speak up (Waldmeir, 2017). The tension between import and export companies became explicitly evident, and the ruling class was increasingly divided once the plan for the "border adjustment" tax regime was revealed, as this made it clear that there would be losers among importers (for example Walmart) and winners among exporters (such as General Electric and Boeing) (Jopson, 2017). But there are "winners" and "losers" across other sectors (Milne, 2016).

It seems that the ruling principle of state-capital relations during the Trump presidency will also depend on extemporaneous negotiations and tacit deals to accommodate the views of the president and some of his advisors. Above all, this will enable Trump to mediate between the demands of big businesses, his own views on how the USA should operate in the global political economy, his idiosyncrasies and his electoral mandate. Adam Tooze has developed this point about new rules for negotiations between the state and corporations more precisely.

> We might be talking of a new compromise under which protectionism buys political support for the priorities of key segments of US business that do retain influence within the party and in the White House and whose agendas coincide with the worldview of right-wing libertarians [...] (Tooze, 2017).

Trump's dialogue with big corporations and US-based transnational capital is the source of uncertainty for managers, some of whom wrote a letter to the president to express their concern about the "urgent need to restore faith in our vital economic and government institutions" (Crooks *et al.*, 2016). As a journalist highlighted,

> [b]usiness likes certainty, and no chief executive can predict what Mr Trump will do next or what impact it will have on his company's share price. Emotions are running just as high. Some business leaders seem intoxicated at the prospect of breaking bread with the most powerful man on earth [...] (Waldmeir, 2017).

Trump's rhetoric is not anti-capitalist, but is far enough from the worldview of globalists to scare them. In fact, while a business chief compared Trump to a "natural disaster", it seems that many companies will give a forced smile (Waldmeir, 2017). Given that is difficult to foresee the consequences of Trump's actions and that these consequences are mediated according to the particular sector, company and context, it seems plausible that what such an attitude might achieve is to keep the capitalist ruling class fragmented enough to constrain companies to curry favour with the president individually.

Similar tensions characterized Trump's relations with some sections of the bureaucracy. The reaction of the "Deep State" to Trump is a central factor which needs to be analysed as part of this discussion, and in particular in order to understand the complexity that the state apparatus itself adds to capitalism. While bureaucrats understand that Trump is not a revolutionary, they see him as a threat to their sectional interests and decisional power, and above all to the pillars of post-WWII grand strategy, the ideological framework within which they grew up professionally. Not everyone agrees that actions of the "Deep State" are arbitrary (see Grandin, 2017), and the best explanation is probably one spelled out in *The New York Times*.

> Mr. Trump has put institutions under enormous stress. [...] That has forced civil servants into an impossible dilemma: acquiesce, allowing their institution to be sidelined, or mount a defense, for example through leaks that counter Mr. Trump's accusations or pressure him into restoring normal policy-maker practices (Fisher, 2017).

It seems appropriate to describe the opposition to Trump in the words of Ben Rhodes, an advisor to Obama, who described it as "The Blob", by which he meant "the bipartisan class of foreign policy elites– Washington swamp dwellers like Hillary Clinton, Bob Gates and their assorted Ivy League hangers-on [...]". Trump had "managed – or threatened – to blow up many of 'The Blob''s most cherished beliefs about American power", and the effect was to unite "Democrats and many Republicans, hawks and doves, neocons and Obamians, in a frenzy of worry" (Mahaskey, 2017). This demonstrates that Trump is an atypical member of the elite – the ugly duckling in Washington – and that the state is like a giant mixer where the ingredients – or policy inputs – do not always result in the desired meal. Trump's

fights with the FBI – he stated that it was incapable of doing its job – are indicative of that.

This could also be seen in the lack of candidates for the position of National Security Adviser and when a former British spy produced a dossier which alleged ties between Trump and Russia, which the FBI considered worthy of further investigation despite the relationship being unproven (Gamburger and Helderman, 2017). This was also confirmed by conservative scholar Walter R. Mead, who highlighted exactly what has emerged so far in this Afterword: "the establishments of both major political parties were caught completely off-guard. The establishment always has an uncomfortable relationship with Jacksonians" because of their attempt to ride the anti-elitist mood of common people (Mead, 2017). In fact, to the Chairman of the Senate Foreign Relations Committee – a member of "The Blob" – the president looks rather like

> a "wrecking ball" when it comes to longstanding American foreign policy, a newcomer to the burdensome demands of being the world's lone superpower who remains determined "to just destroy everything about" the U.S. establishment's view of the world (Glasser, 2017).

Trump's worldview

Trump was accused of being a narcissist and sociopath, a personality driven by "sky-high extroversion combined with off-the-chart low agreeableness" (McAdams, 2016). This view was somehow reflected in similar arguments about Trump's personality and style. It was stated that he has a "Miami Vice"-like attitude for "law and order", a war-on-drug approach to policy-making (Allen, 2017), and that he is "too honest" and should think twice before externalising what it is in his mind (Heffernan, 2017).

This uncompromising ideological stance has implications in the relation between economic and political power, or for what concerns what was above described as *Wilsonianism-cum-primacy*.

If Obama's interpretation of nationalist liturgy drew on the principle of *e pluribus*

unum, Trump's old-fashioned nationalist discourse originates from *paleo-conservativism*. This is a niche within the Republican Party born in reaction to the GOP's shift to globalism and its tacit acceptance of multiculturalism. If neocons see identity as

> function of political principles and creed, the *paleos* ... argued that nations were defined by the specific cultural and historical heritage of their founders. So "Americanness," for instance, is not established by political ideals as much as by the legacy of Protestant English settlers from whose characters and milieu those ideals emerged naturally (Siegel 2016).

While Obama's worldview depicted an interconnected global system, Trump's "worldview defined by power" (Palacio, 2016) finds new or 'modified old' monsters to be fought (Ó Tuathail 1998, 171) and his discourse relies on the rhetorical device of "otherness" (Dalby 1990) – according to which 'difference is a threat' (Dalby 1990, 171). However, it would be reductive to consider Trump's discourse simply as populist smoke in the eyes of citizens for elites' interests. Trump manifested a disarticulated worldview where 'social and political organization are defined in terms of this or that state' (Agnew 2003a, 98). This fragmented and power-driven psycho-ideology is based on Hobbesian or even social Darwinist assumptions about life:

> Manhattan is a tough place. This island is the real jungle. If you're not careful, it can chew you up and spit you out. But if you work hard, you can really hit it big, and Imean really big. (Trump 2004, 0.26–0.38).

The application of such a competitive, inward-looking, and divisive view to international politics was illustrated in during the presentation the National Security Strategy 2017:

> A nation without borders is not a nation. A nation that does not protect prosperity at home cannot protect its interests abroad. A nation that is not prepared to win a war is a nation not capable of preventing a war. A nation that is not proud of its history cannot be confident in its future. And a nation that is not certain of its values cannot summon the will to defend them. (Trump 2017e).

This however, did not only reflect a banal ritual of nationalist values. Trump in fact proved to posses a coherent and historically-informed ideological perspective on world affairs and of the role of the US in the international system. It has been explained that his worldview is also the product of a perception of the American decline which followed the Vietnam War, the downturn of the 1970s, the hostage crisis in Iran, but also, as mentioned above, the sliding towards the centrist ideological ground by the Republican Party. Trump 'has been saying all this, or much of it, for more than thirty years', and his view stems from the

> blunt early 19th century appeal of Andrew Jackson to the "common man" and the protectionist isolationism which produced the Smoot-Hawley tariffs and Charles Lindbergh in the 1930s (Laderman and Simms, 2017).

As Trump himself admitted, his model of American greatness is "the turn of the [20th] century, that's when we were a great, when we were really starting to go robust", together with the Truman's years (Haberman and Sanger, 2016). Coherently with the attempt to reverse American decline, Trump should "lead the biggest U.S. Navy build-up since the Reagan administration" (Larter, 2016; Wood, 2016, p. 261). Trump has also made it clear that he wants to increase the number of combat aircraft by 100 units and the Army by 60,000 troops, although, as mentioned earlier, the Pentagon and the industrial lobbies tied to it favour capital-intensive investment in technology and are concerned "that rising personnel costs would take money from modernization and readiness accounts" (Shane III and Tilghman, 2016). However, it is impossible to avoid the question of what the purpose of the build-up of military capabilities is in the context of a Russophile, isolationist foreign policy. There are two answers. Firstly, this will probably be not a *tout court* approach, but Trump will have to find a compromise in order to apply a selective isolationism. Robert Kagan (2016) seems to share this opinion in his statement that the USA has never really adopted a posture completely detached from the rest of the world and that Trump's argument about America first "does not mean a 'return' to a mythical American isolationism".
Secondly, China looms large in Trump's selective isolationism.

Although there are differences with Obama, the implication of Trump's worldview produced more continuity than change. The current president envisioned "an arm's length approach which cedes Moscow its zone of influence in the Near Abroad to reduce friction" over an area which has lost strategic interest for the USA (Palacio, 2016). Continuity was also confirmed during Trump's first trip to the Middle East and Europe. It is true that when visiting Saudi Arabia Donald Trump, contrarily to his predecessor paid great respect to the sultanate – Trump called King Salman "a wise man" (Trump, 2017c) – even though it is unclear to what extent he was not uninfluenced by the establishment, given that in the past he attacked Saudi Arabia for its "complicity" with 9/11 events. Blaming Iran for causing regional instability, Trump used "exactly the kind of rhetoric the Sunni strongmen of the region yearned for during the Obama years" (Hounshell, 2017). However Trump's speech in Saudi Arabia broke with Bush's messianic discourse, as the president stated the US does not want to give "lectures". Trump told that

> "we are adopting a Principled Realism […] Our partnerships will advance security through stability, not through radical disruption (Trump, 2017b).

This means that Trump wishes to relive the US from some responsibilities in the Middle East. This is one interpretation that could be given to the agreement on $110 billion in military aid. As Trump himself crucially stated "the nations of the Middle East cannot wait for American power to crush this enemy for them. The nations of the Middle East will have to decide what kind of future they want for themselves, for their countries, and for their children" (Trump, 2017b). Meanwhile the deal was also aimed at receiving sounding billions in investments – $400 billion – which is a reminder of Trump's business-driven politics. Then, similarly to Obama, he criticized Nato allies for their "chronic underpayment" (Trump, 2017c).
Trump would eventually accept a "new balance of power" around the Mediterranean

basin which is likely to favour Russia and Iran, but which will also unleash an age of conflict which will eventually bring about a new order (Gardner, 2016).

Despite with the attack on Syria, the increase of troops in Afghanistan and Bannon's departure it seemed that generals and globalists were slowly reining in the temperamental president (Sengupta, 2017), in the Spring of 2018 there was a clear rebalance of relations of powers inside the administration.
In fact, the internal tensions that have characterized the first year of the Trump administration were partly resolved with a turn that seems to favour the president rather than the globalists. After Gary Cohn – director of the National Economic Council and ex president of Goldman Sachs – resigned protesting against Trump for the president's intention to pursue trade sanctions on steel and aluminium, Rex Tillerson and General H. R. McMaster were invited to leave their positions. They were replaced by Mike Pompeo and John Bolton, who have strengthened the right wing, nationalist, and war-mongering soul of the government:

> With the exception of Jim Mattis, the US defence secretary, Donald Trump has now cleared the decks of people who stand up to him (Luce 2018).

This shift within the inner circle of top foreign policy makers allowed Trump to adjust US foreign policy towards China according to his interpretation of *Wilsonianism-cum primacy*.

The Indo-Pacific strategy

Continuity from Obama's to Trump"s "pivot" was signalled by two important statements during the handover from one administration to the other in late 2016. Admiral Harris signed an agreement with the Australian military for increasing joint exercises, deploying American F-22s "in the area of those exercises in 2017, likely to be followed by F-35 jets the year after" (Innis 2016). The Admiral highlighted that America "will not allow the shared domains to be closed down unilaterally [...] in the South China Sea" (Innis 2016).

A long-standing member of the American bureaucracy, Ash Carter, laid out a corollary to Obama's "pivot to Asia", stating that the Asia-Pacific is becoming the centre of gravity for global affairs; China is "out of step" with the wishes of other states in the region; and thousands of Americans gave their lives in the Pacific for values the United States still wants to uphold (Carter, 2016).

While there is still uncertainty with regard to a few details on Trump's "pivot" – for instance, to what extent the increase of the DoD budget will translate in a coercive posture in the Pacific – there are strategic continuities and some tactical differences compared to the Obama.

Compared to Obama"s veiled interventions, Trump was more explicit. He stated that the "United States must marshal the will and capabilities to compete and prevent unfavourable shifts in the Indo-Pacific" (NSS 2017, 45), and launched the "Indo-Pacific Dream", a strategy that envisions "a beautiful constellation of nations, each its own bright star, satellites to none" (FOIP) (Trump 2017d). As the US Secretary of Defense explained "[T]his is our priority theater" (Mattis 2018; Mattis 2017).
In what ways the FOIP encapsulates the structural tension of American grand strategy was explained by an official from Bureau of East Asian and Pacific Affairs:

> So by free we mean, first of all, the international plane. We want the nations of the Indo- Pacific to be free from coercion, ... Secondly, we mean at the national level, we want the societies of the various Indo-Pacific countries to become progressively more free ... in terms of good governance, ... fundamental rights, ... transparency and anti-corruption (Wong 2018).

Wong also explained why the policy was not called anymore "rebalancing" or "pivot". The term Indo-Pacific is a rhetorical device that locks India into an alliance with the US, as "it acknowledges the historical reality and the current-day reality that [...] India, plays a key role (Wong 2018). This denoted continuity with regard to Obama"s diplomacy of alliances (NSS 2017, 50).

At the core of the Indo-Pacific strategy: China

Despite such a comprehensive geopolitical viewpoint, the FOIP is primarily concerned with China. It is the forced cooperation and restrained confrontation with Beijing that frames American grand strategy in Asia. Trump and some top men in his administration were unequivocal about how they are going to strike a balance within the strategic-ideological framework of *Wilsonianism-cum-primacy*. Trump stated that a "geopolitical competition between free and repressive visions of world order is taking place in the Indo-Pacific region" (NSS 2017, 45), while Mattis echoed this highlighting that "China's infrastructure investments and trade strategies reinforce its geopolitical aspirations" (NSS 2017, 46) creating spheres of influence. The FOIP, aims at "help[ing] South Asian nations maintain their sovereignty – as China increases its influence in the region" (NSS 2017, 50). For Mattis "we cannot accept Chinese actions that impinge on the interests of the international community" (Mattis 2017).

Both Trump and Mattis admitted that there can be no more important subject than China-U.S. relations (Trump and Xi 2017; Mattis 2017), and Mattis specified that the framework of the "Indo-Pacific strategy informs our relationship with China" (Mattis 2018). While the Obama Administration initially sought a cooperative strategy, the Trump Administration has been more consistent so far. Trump's close advisors called China "bully and potential aggressor" and promised "a strategy of peace through strength" (Gray and Navarro, 2016). At his Senate confirmation hearing, former Secretary of State Rex Tillerson warned China that "peace through strength" means "first, the island-building stops and second, your [China's] access to those islands also is not going to be allowed" (Tillerson 2017, 06.25.16 – 06.25.25). Equally, Mattis threatened that

> there are consequences that will continue to come home to roost, so to speak, with China if they do not find the way to work more collaboratively with all of the nations who have interest" (Mattis 2018).

A telling action executed by Mattis following the continues military build-up in the South China Sea"s islands by Beijing was that "we disinvited the People's

Liberation Army Navy from the 2018 Rim of the Pacific Exercise ... the world's largest Naval exercise" (Mattis 2018).

From Obama to Trump: similar objectives but a tougher posture towards China

While Obama sought a nuanced equilibrium between economic and political objectives, Trump's synthesis of American global and national interests contained a sharper political ambition. Therefore, on the one hand Obama and Trump shared similar concerns as they tried to contain China's growing economic power. In his Asian tour Trump denounced that "other countries used government-run industrial planning and state-owned enterprises" to engage in "product dumping subsidised goods, currency manipulation and predatory industrial practices", and expressed concern for "violations, cheating or economic aggression" that damages American private enterprise. (Trump 2017d). Trump highlighted the need of "addressing China's market access restrictions and technology transfer requirements, which prevent American companies from being able to fairly compete within China" (Trump and Xi 2017).
This rhetoric became more tangible when, at the end of May 2018, Trump announced additional 25% duties for a list of products that includes about 1,102 separate U.S. tariff lines (USTR 2018b) for a total of $50 billion in 2018 trade value. The logic of this list was to hit products from industrial sectors related to the "Made in China 2025" industrial policy, particularly those regarding "aerospace, information and communications technology, robotics, industrial machinery, new materials, and automobiles". The list does not include goods commonly purchased by American consumers such as cellular telephones or televisions. The trade sanctions were published in the Federal Register of June 20, 2018 and became effective on July 6 (Federal Register 2018, 28710-28756). The centrality of the Silicon Valley, other American technological hubs and the increasingly important infrastructural value of data in the national and world economy, are also central to Trump's NSS 2017. The US Trade Representative and ambassador to the World Trade Organization Robert Lighthizer went as far as stating that there is an "unprecedented threat posed by China's theft of our intellectual property, the forced transfer of American technology, and its cyber

attacks on our computer networks". In particular, he was concerned because "[T]echnology and innovation are America's greatest economic assets ... we must ... protect American competitiveness" (USTR 2018).
On June 18, Trump announced more tariffs worth £200 billion should China react the new tariffs (Trump 2018). Questioned about "how does that [free trade] tally with the imposition of tariffs and the pulling out of the TPP?", Mr. Wong replied that "you have to enforce the rules of free trade. ... If you don"t do this, ... the free, fair, and reciprocal trading regime is weakened, ..."

A US-friendly multilateralism: ASEAN, APEC, TPP 11

While the rise of China remains the core of US rebalancing towards Asia, it was rightly explained that "[T]he Free and Open Indo-Pacific Strategy is not just about China, and this is for the very simple reason that the region is much larger than China" (Wong 2018). The way to achieve the objective of the FOIP is to ensure that the "maritime commons is a global good" through "a network of allies and partners" (Mattis 2018). However, if the objective of American grand strategy is geoeconomic openness coupled with geopolitical primacy, the US will not only have to curb territorial tensions involving China, Taiwan, the Philippines, Malaysia, Brunei, Indonesia, Singapore, and Vietnam. It should also lead processes of regional governance. US state managers are clearly concerned that ASEAN or APEC members" national interests might not match those of Washington, D.C. Mattis stated that the US will continue to "support ASEAN centrality in the regional security architecture, and seek to further empower it". However, he warned regional partners. The US will counter particularistic – nationalist – instances: "[T]he more ASEAN speaks with one voice, the better we can maintain a region free from coercion, one that lives by respect for international law" (Mattis 2018). Mattis in fact, told that the US "seeks to integrate diplomatic, economic and military approaches to regional concerns" (Mattis 2017).

Similarly, while leaving the TPP 12 helped Trump's fulfil his electoral promises, the Trump Admnistration will need to be in those institutional, regional *rendez-vous* in order to enforce US-friendly rules,

> to ensure that these [ASEAN, APEC] regional organizations which convene the nations of the entire Indo-Pacific are committed to the principles that we see as yielding these strategic, economic – economic benefits that have arisen in the past 70 years as we've pursued our own strategy (Wong 2018).

However, the TPP 11 could still be used as a blueprint for future trade agreements or for a return to a TPP 12. While the US could lose a 0.5 percent in GDP growth in addition to $2bn, the TPP 11 still benefits Washington, D.C. Firstly, because the US after Trump could always re-join – and potentially, even with Trump as president. Secondly, because the TPP 11 continues to perform as an obstacle to China's geoeconomic and geopolitical hegemony.

Two reasons to tackle North Korea

Trump adopted a similar approach towards North Korea. On the one hand, his attacks toward Pyongyang mirror the logic of "open doors and closed frontiers" of American grand strategy. In fact, US elites remain disappointed by the resilience of a space sealed off to capitalist accumulation.
On the other hand, Trump's approach to North Korea must be looked at in an anti-China perspective. This has been a test for US-China relations of power in the region and a tool for obtaining economic gains and disciplining China's state capitalism. In addition to these structural interests of US foreign policy, the rhetoric between Pyongyang and Washington, D.C. have contributed to trigger a perfect "security dilemma" which adds more complexity to this troubled relationship. For the time being, however, Kim Jong-un's interest in opening up North Korea to state-led capitalism and the summit between the two Koreas brought Trump to accept a more peaceful interaction for the time being. While war cannot be excluded, American foreign policy makers are wary of the fact that North Korea is more dangerous than Iraq or Iran. The US would certainly win a conventional confrontation with North Korea, but it will not be

able to avoid death and destruction in South Korea or other US Pacific territories. Even if the US and its allies will prevail, it will still be a "pyrrhic" victory which might "leave behind sights more suited to Stalingrad than Seoul" (Peddada, 2017).

Difficulty to intervene with a military campaign to oust the regime of Kim Jong Un – given the lack of precise information on the ground (Klimas, 2017) – is likely to trigger a chain of dramatic events. The conflict might shift to a guerrilla warfare for which North Korea has been preparing for a long time, while waves of migrants and refugees from the peninsula could reach China, Russia, Japan and the US (Peddada, 2017).

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